Planning Tool

Introduction:

What is the Planning Tool?

The ***Planning Tool*** ties directly to a ***Funding Application***. The ***Planning Tool*** is composed of the ***School District / Agency Plan*** and several Plan Additions:

School District / Agency Plan: This is required of all districts applying for funds through ePAGE. The ***School District / Agency Plan*** has several components: Mission Statement, Needs Assessment, Goals, Objectives, Action Steps and Fiscal Resources.

School Plan / Action Steps: A school within the district can create its own ***School Plan***, which is built on the District Plan's Goals and Objectives, but requires Actions Steps for each individual school. ***School Plans*** are **NOT required** except for new Schoolwide programs, new School Improvement grants and 21st Century grants.

School District Improvement Plan Requirements: This section lists the requirements that must be in the ***School District / Agency Plan*** as Objectives for every district that is in District Improvement status. Once required objectives are entered into the ***School District / Agency Plan***, the district check marks each requirement as completed.

School Improvement (SI) Plan Requirements: This section lists the requirements that must be in the ***School Plan*** as Action Steps for each school NEWLY awarded a School Improvement grant. Once the Required Action Steps are entered into the ***School Plan***, the district check marks each requirement as completed.

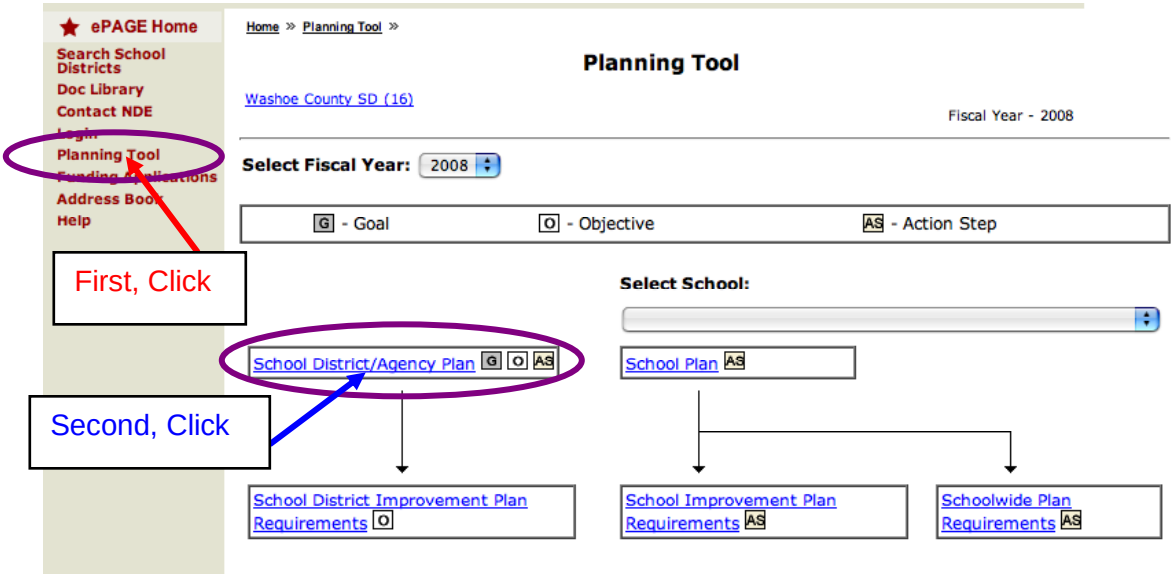
Schoolwide Plan Requirements: This section lists the requirements that must be in the ***School Plan*** as Action Steps for each NEW Schoolwide program. Once the Required Action Steps are entered into the ***School Plan***, the district check marks each requirement as completed.

Where does the LEA start the Plan?

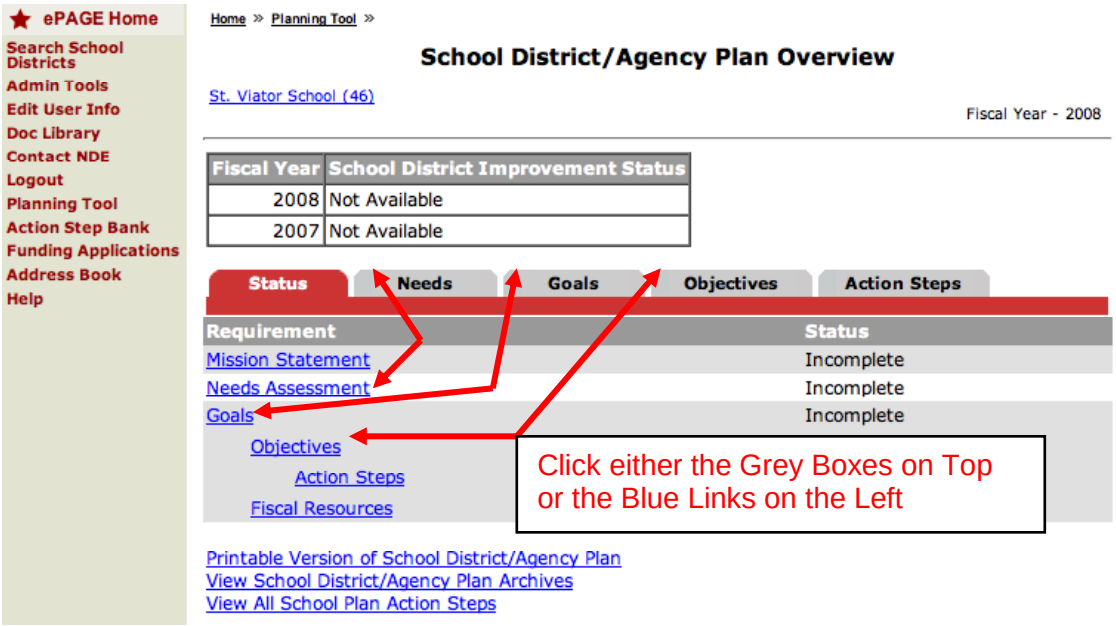
The first step is to create the ***School District / Agency Plan***. Next, the district can modify the plan, if appropriate, to meet District Improvement requirements and/or allow schools to develop their school plans.

School District / Agency Plan:

Click the ***Login*** link from the left menu bar to login.
Click ***Planning Tool***
Click the blue link ***School District / Agency Plan***

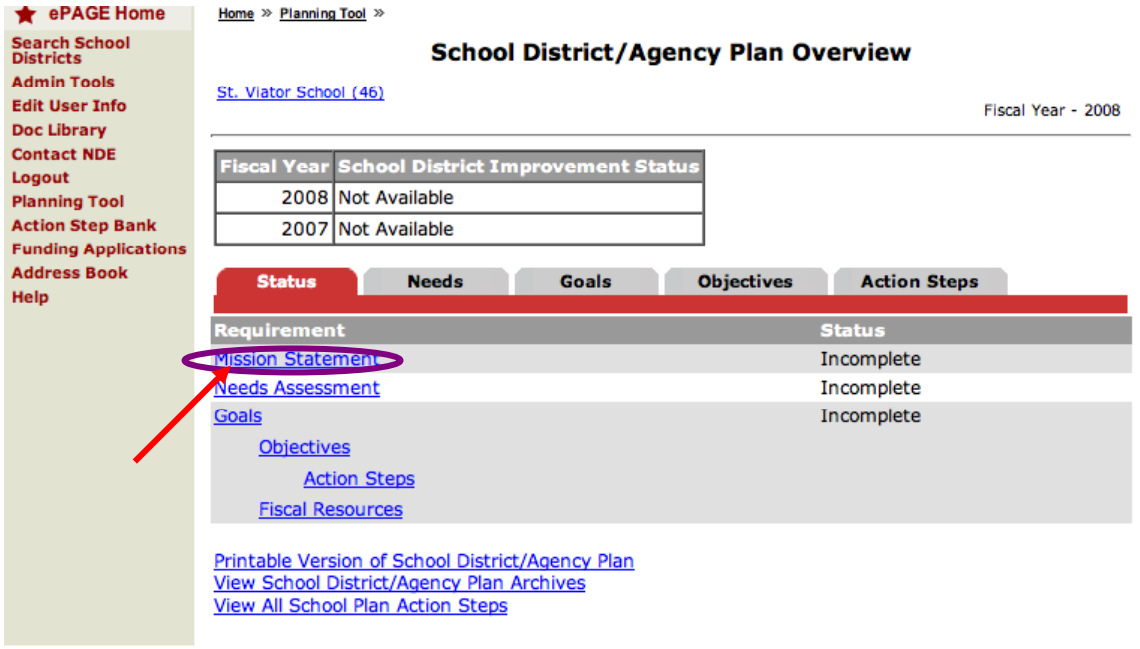


You will be taken to the ***School District / Agency Plan Overview*** page.

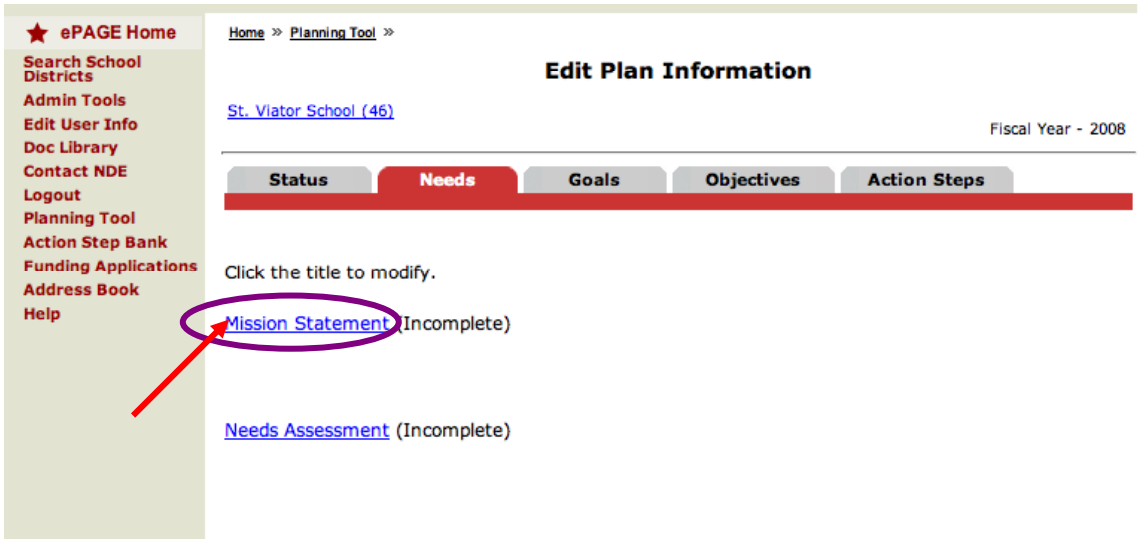


This is where you begin to build the ***School District / Agency Plan***. The default page is ***Status***. Click either the blue links or the grey boxes next to ***Status*** to navigate in these pages.

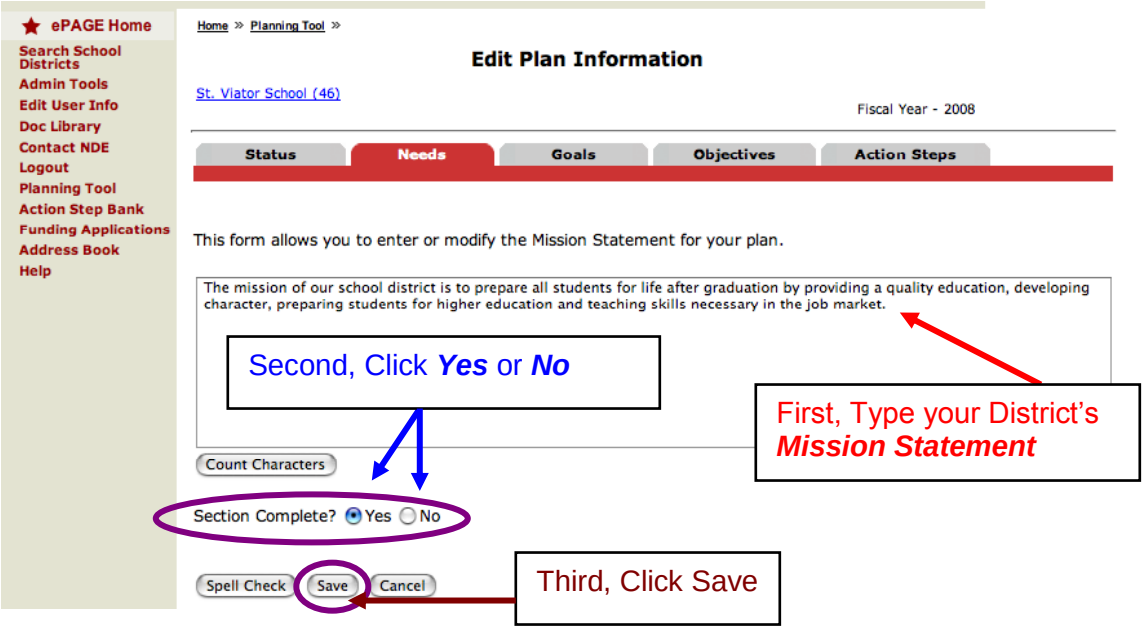
Click the blue link ***Mission Statement***



You will be taken to the ***Edit Plan Information*** page. Click the blue link ***Mission Statement***.

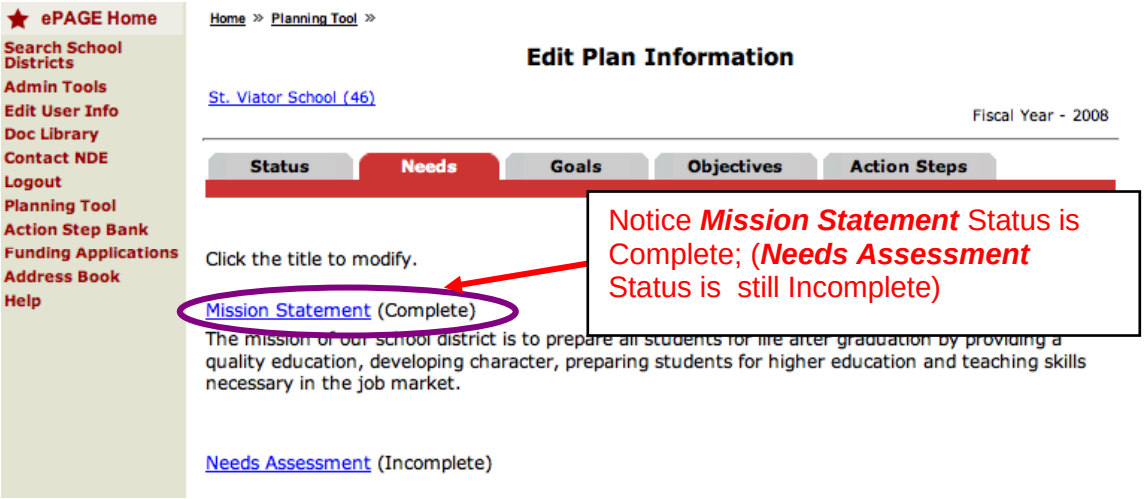


Type your District's ***Mission Statement***. See the following example.



The ***Section Complete*** buttons allows Districts with multiple users to enter the ***Mission Statement*** or ***Needs Assessment*** and leave notification for other users to review what has been entered.

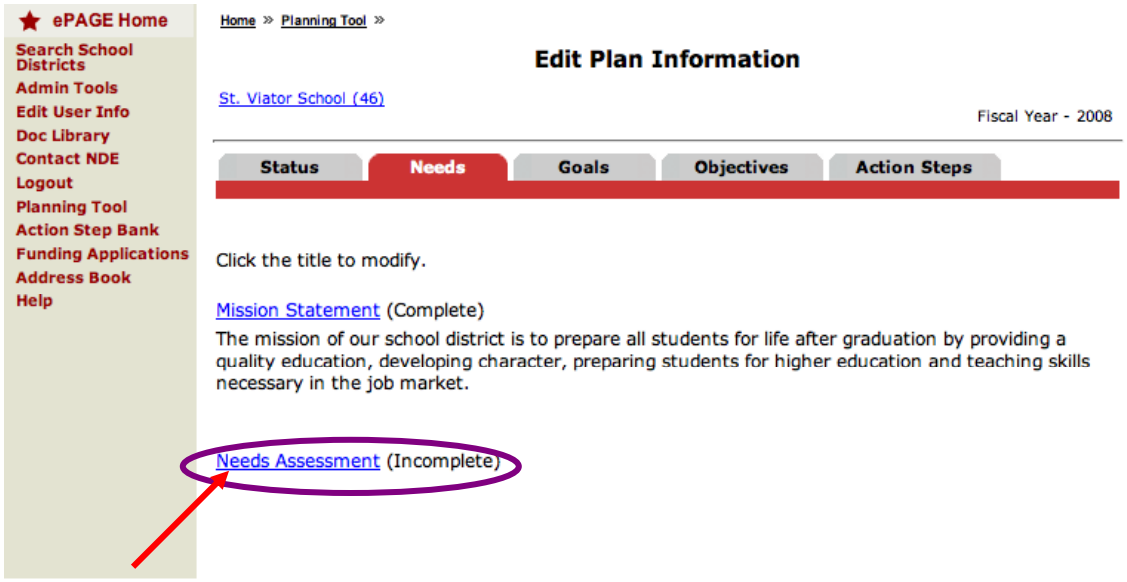
If you Click ***Yes*** at ***Section Complete?***
Then Click ***Save***, you will notice the Status has been changed from ***Incomplete*** to ***Complete***. Other users will be able to see this part is complete.



If you Click ***No*** at ***Section Complete?***
Then Click Save, you will notice the Status remains ***Incomplete***. (Not shown)

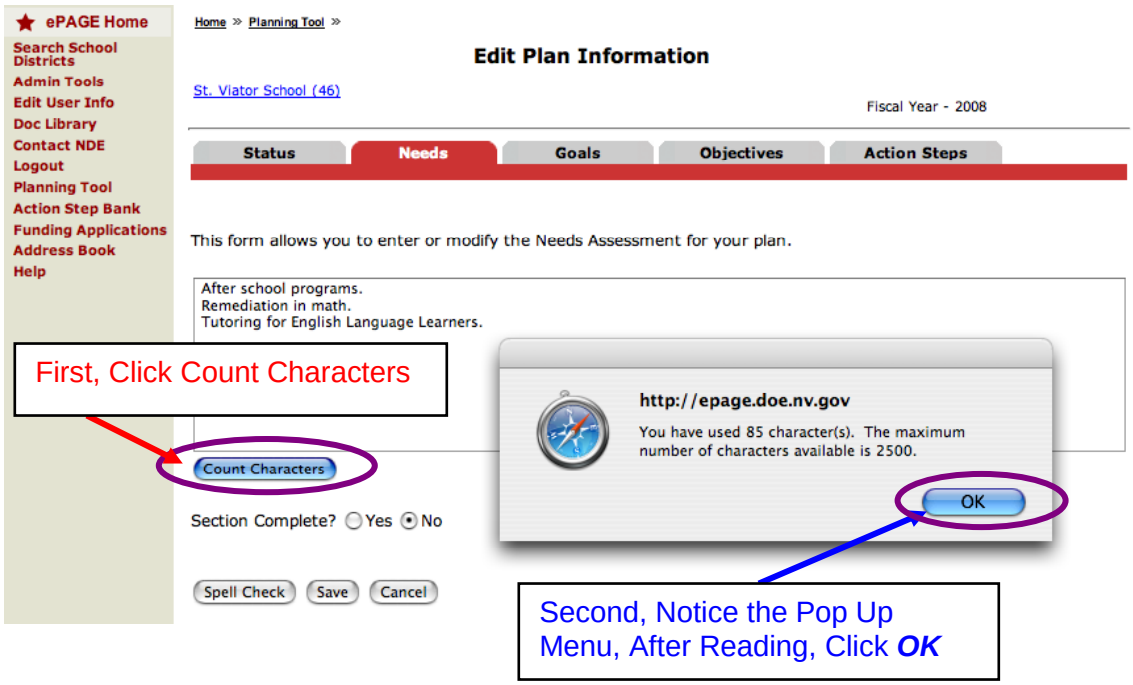
You may update the Mission Statement at any time repeating the above process and editing, Clicking ***Save*** when done.

Click the blue link ***Needs Assessment***



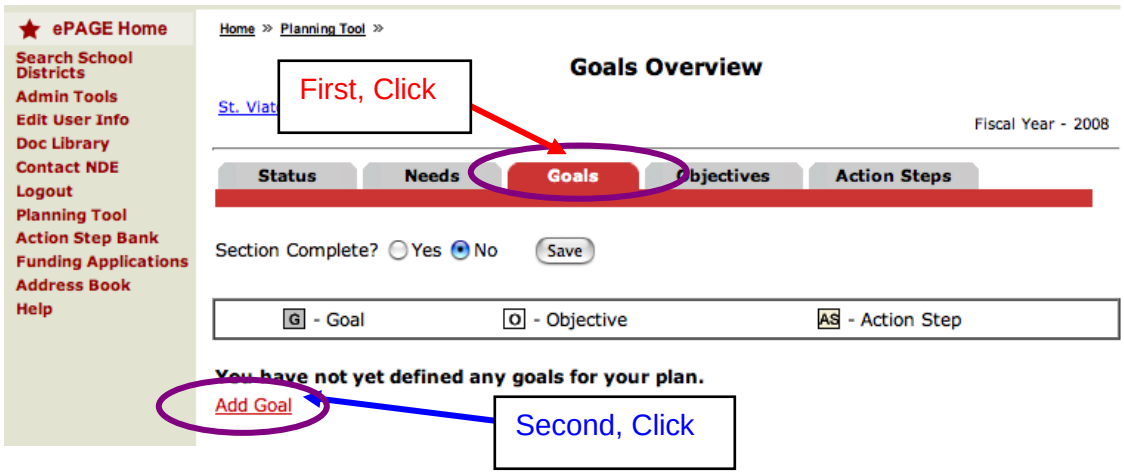
The process to complete the ***Needs Assessment*** is the same process used to complete the ***Mission Statement***. See ***Mission Statement*** for step by step instructions.

In the ***Edit Plan Information*** page, as well as many other areas in the ***Planning Tool***, there are maximum amounts of characters that cannot be exceeded. You may Click ***Count Characters*** when typing text to see a pop up menu stating how many characters have been used and the maximum number. See the following example:

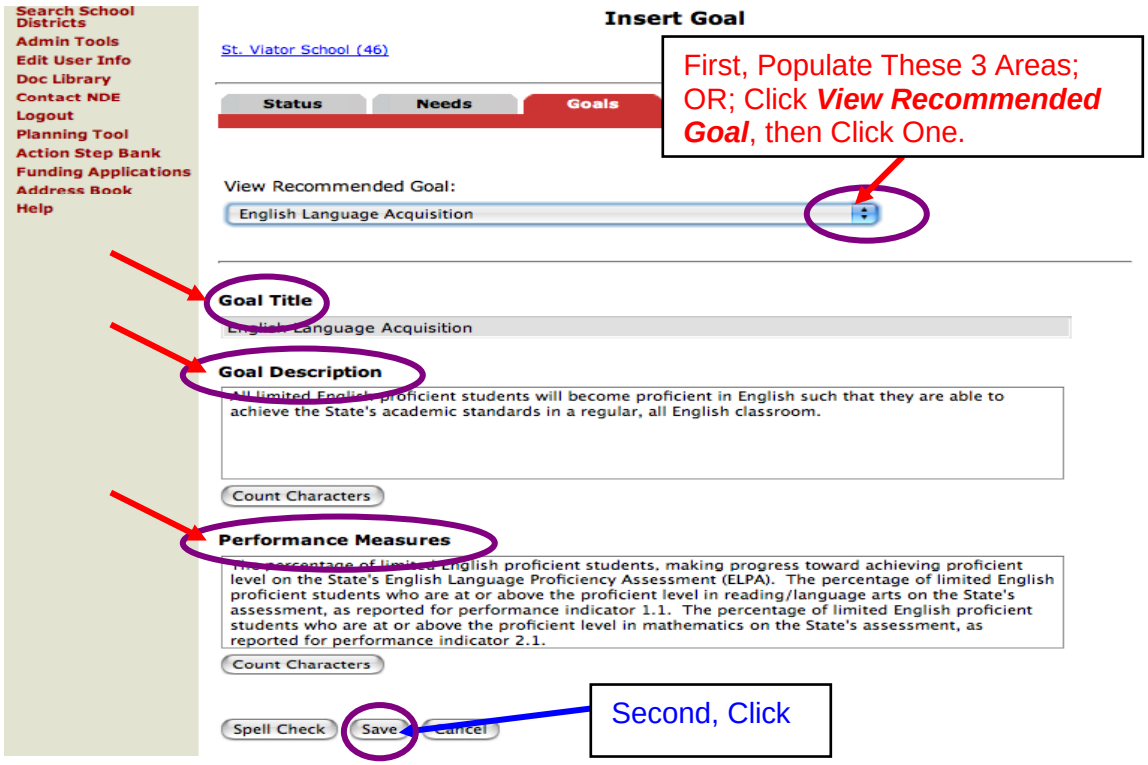


Once the ***Mission Statement*** and ***Needs Assessment*** are complete, you are ready to enter ***Goals***.

Click ***Goals***. You will be taken to the ***Goals Overview*** page.
Click the red link to ***Add Goal***.

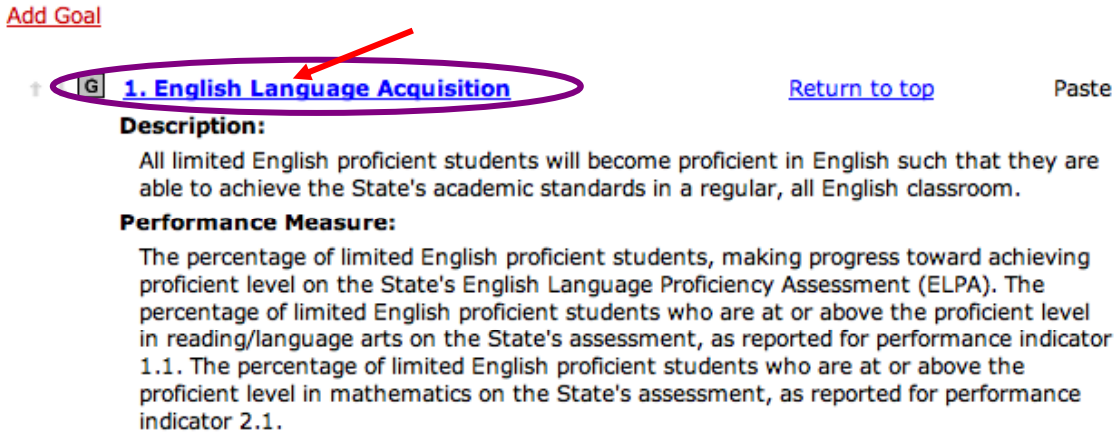


You will be taken to the ***Insert Goal*** page.
You may either type in your own ***Goal Title, Goal Description*** and ***Performance Measures***, OR you may Click ***View Recommended Goal***. This will populate the page with information stored in ePAGE.
Click ***Save***

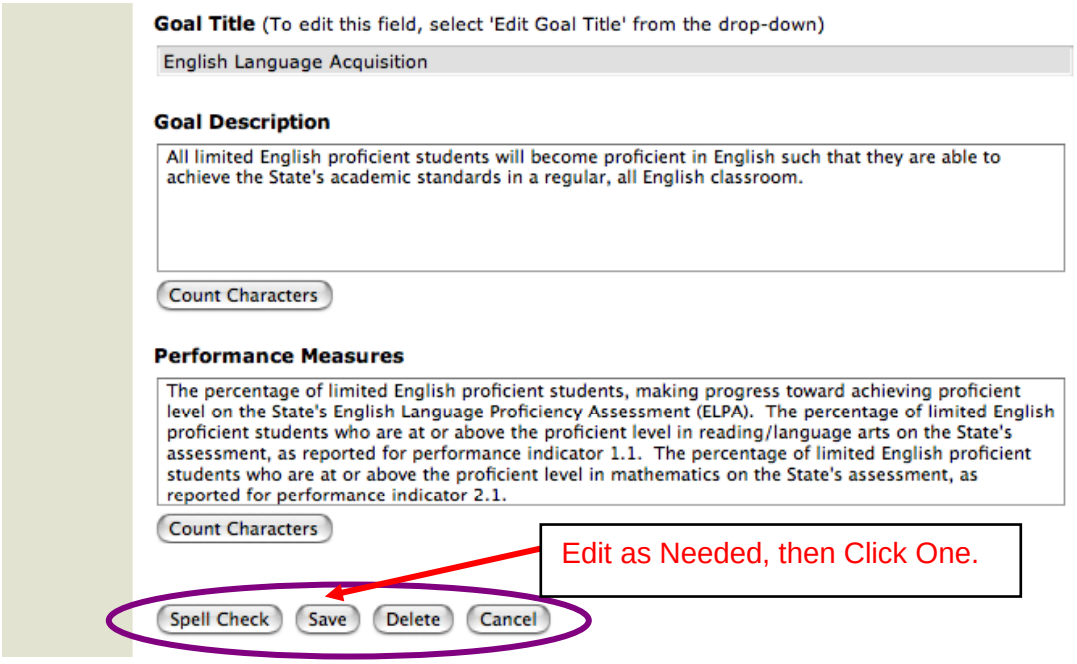


You will notice the ***Goals Overview*** page has been populated with the Goal.

As in other areas of the Planning Tool, you may edit this goal by Clicking the blue link, in this instance, ***1. English Language Acquisition***.

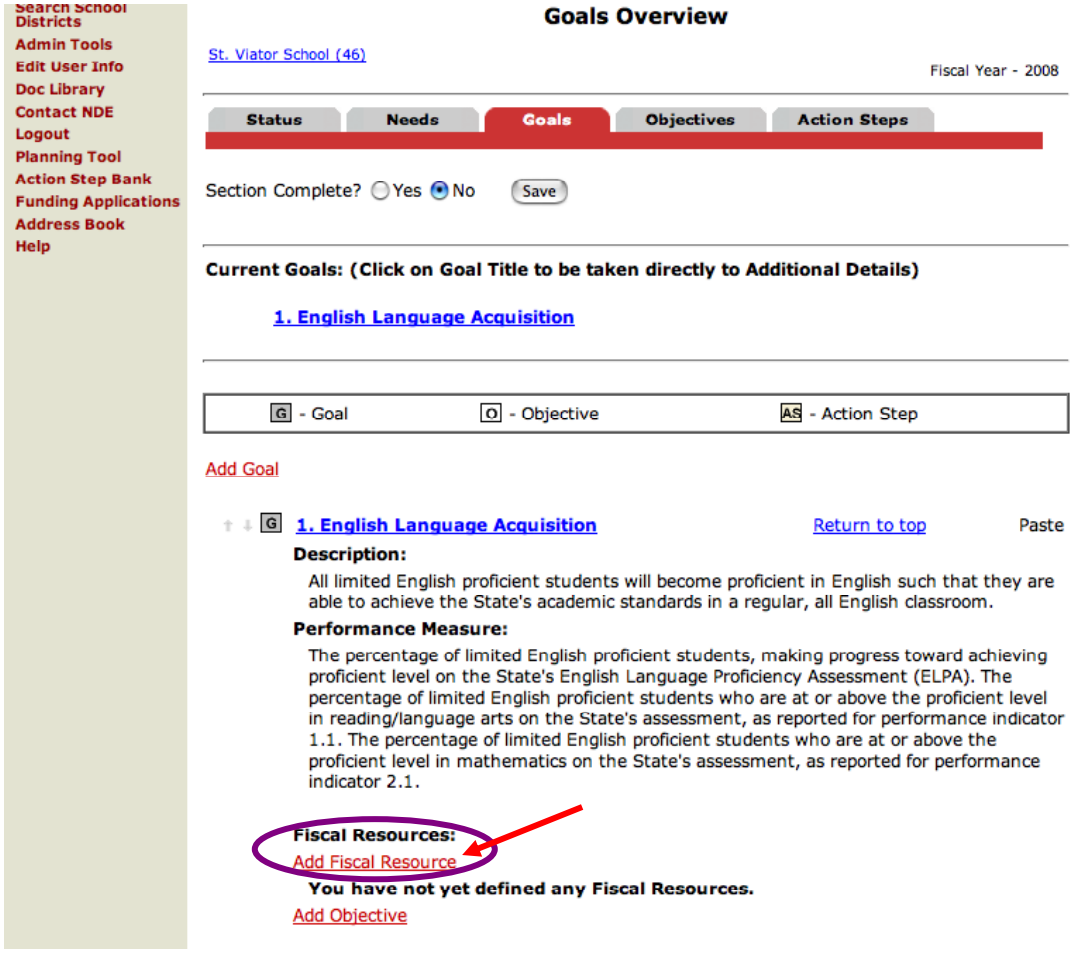


Scroll towards the bottom of the page, where you will notice you can run ***Spell Check***, ***Save*** changes after editing, ***Delete*** the goal if desired, or ***Cancel*** to go back to the prior page.



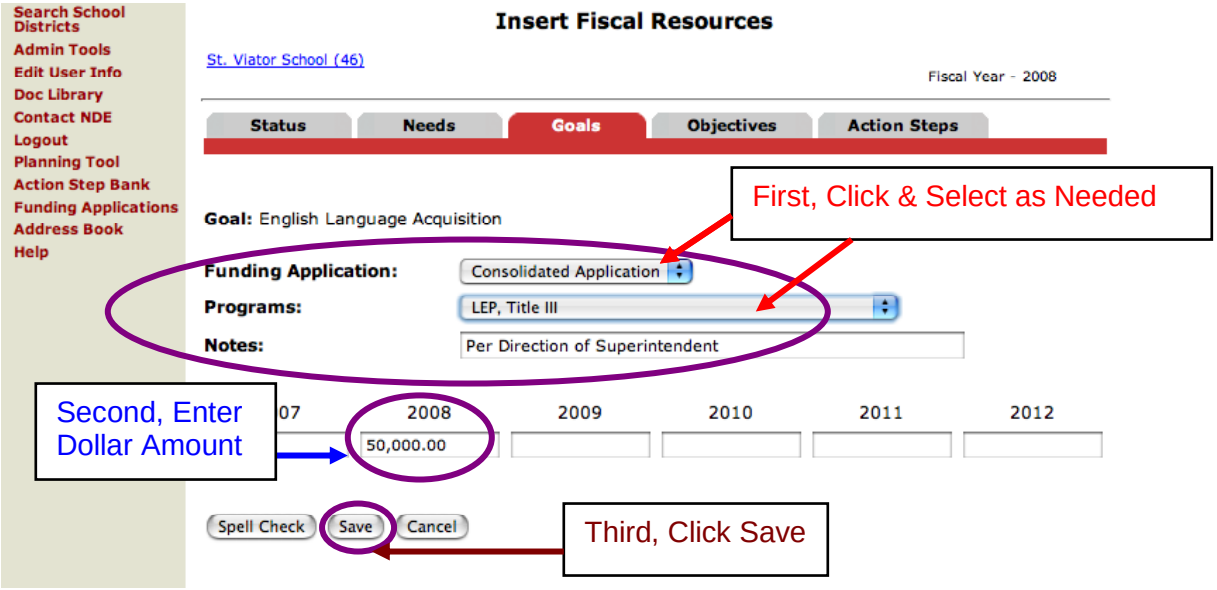
Notice the page reads "You have not yet defined any Fiscal Resources."

Click the red link ***Add Fiscal Resource***



You will be taken to the ***Insert Fiscal Resources*** page.

Click to select the appropriate ***Funding Application***.
Click to Select the appropriate ***Programs*** (Grants).
Type ***Notes***, if desired.
Enter ***Dollar Amounts*** for the fiscal year.
Click ***Save***.



You will notice the ***Fiscal Resource*** has been added.

Repeat the process to add a new ***Fiscal Resource***, as needed.

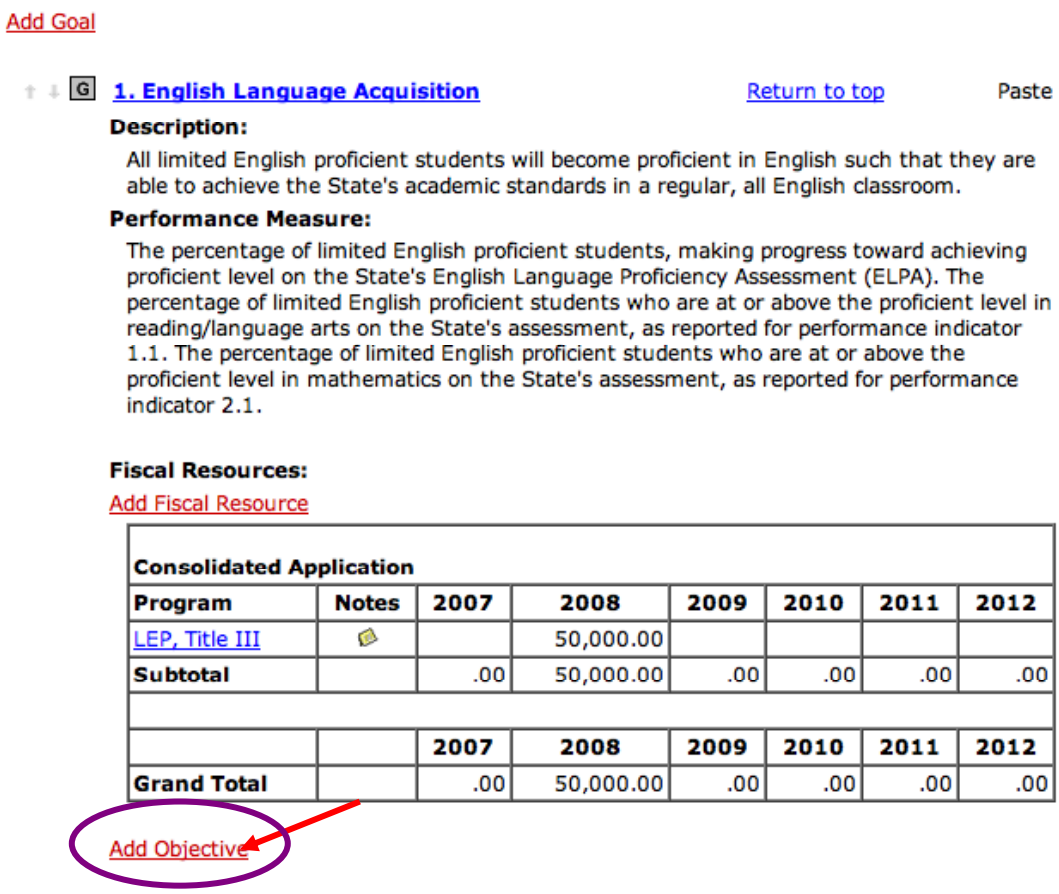
Edit by Clicking the blue link for the appropriate ***Program*** in the ***Fiscal Resources*** section.

*** See the **Funding Applications** section for information on how the ***Fiscal Resources*** in the ***Planning Tool*** works with ***Funding Applications*** ***

The next step is to add an ***Objective***.

(You will notice in the example below the information in the ***Planning Tool*** continues to grow.)

Click the red link ***Add Objective***.

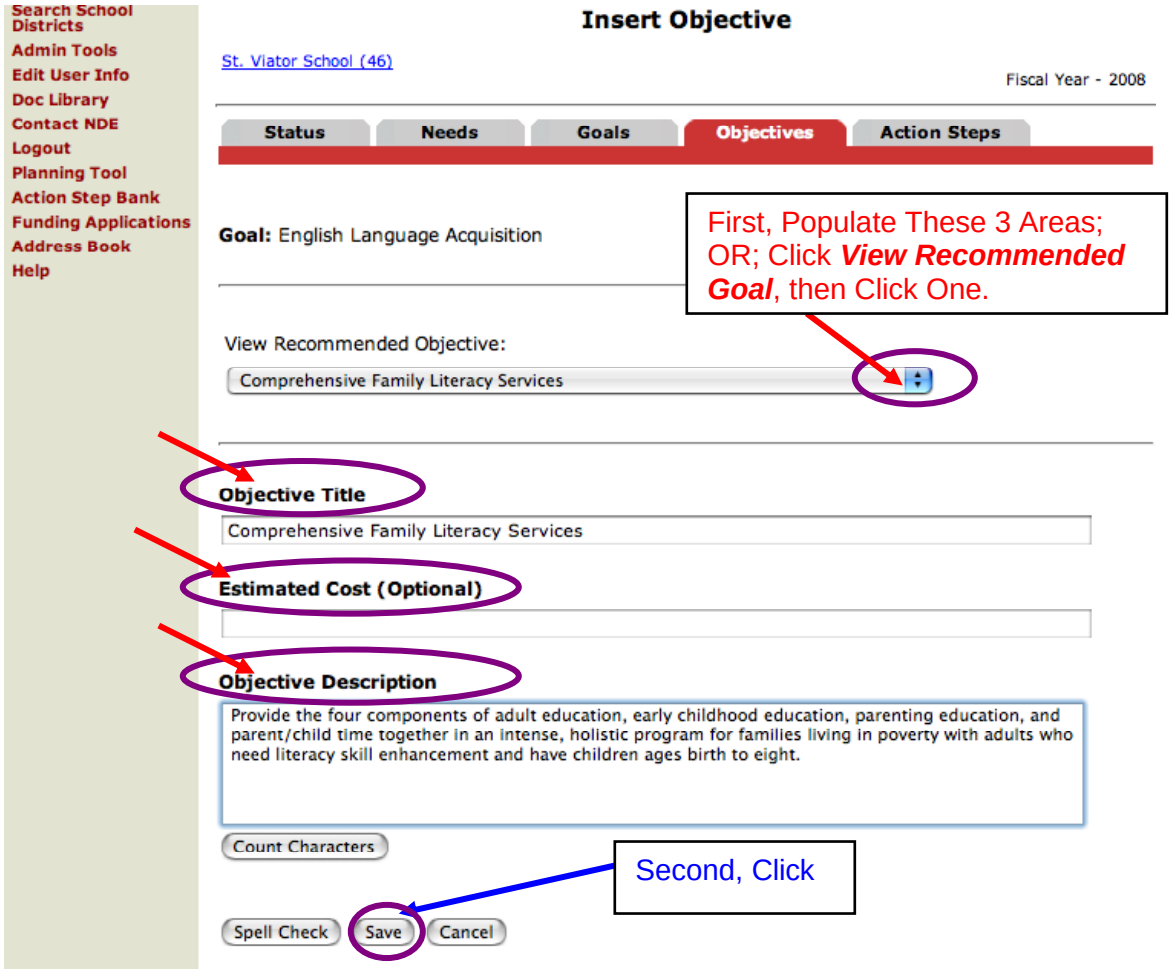


You will be taken to the ***Insert Objective*** page.

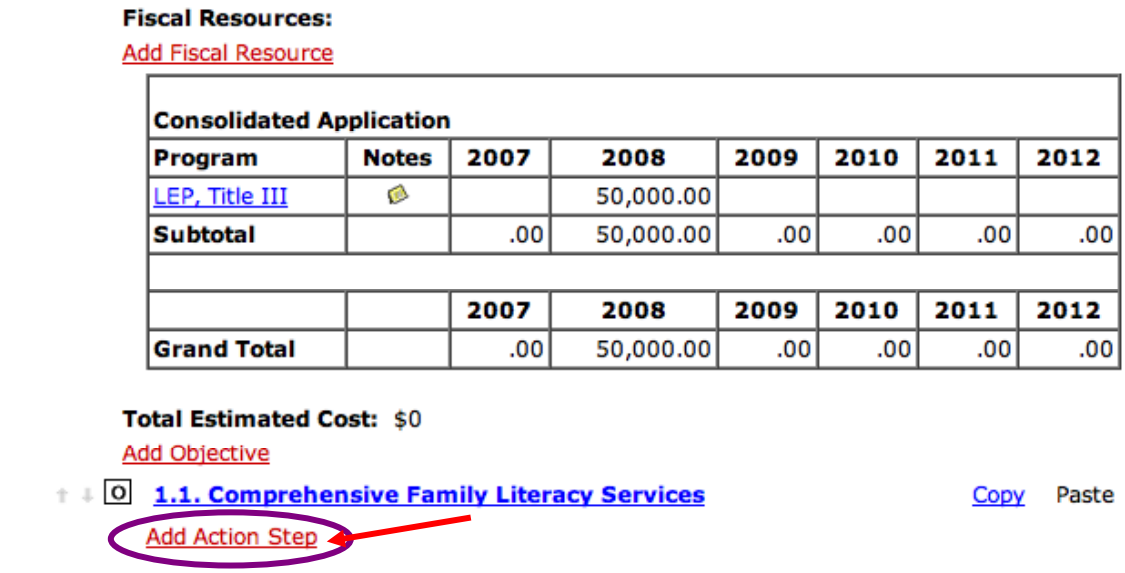
This page is filled out in the same manner as the ***Goals Overview*** page. For further information, refer to the ***Goals Overview*** page.

See the following example:

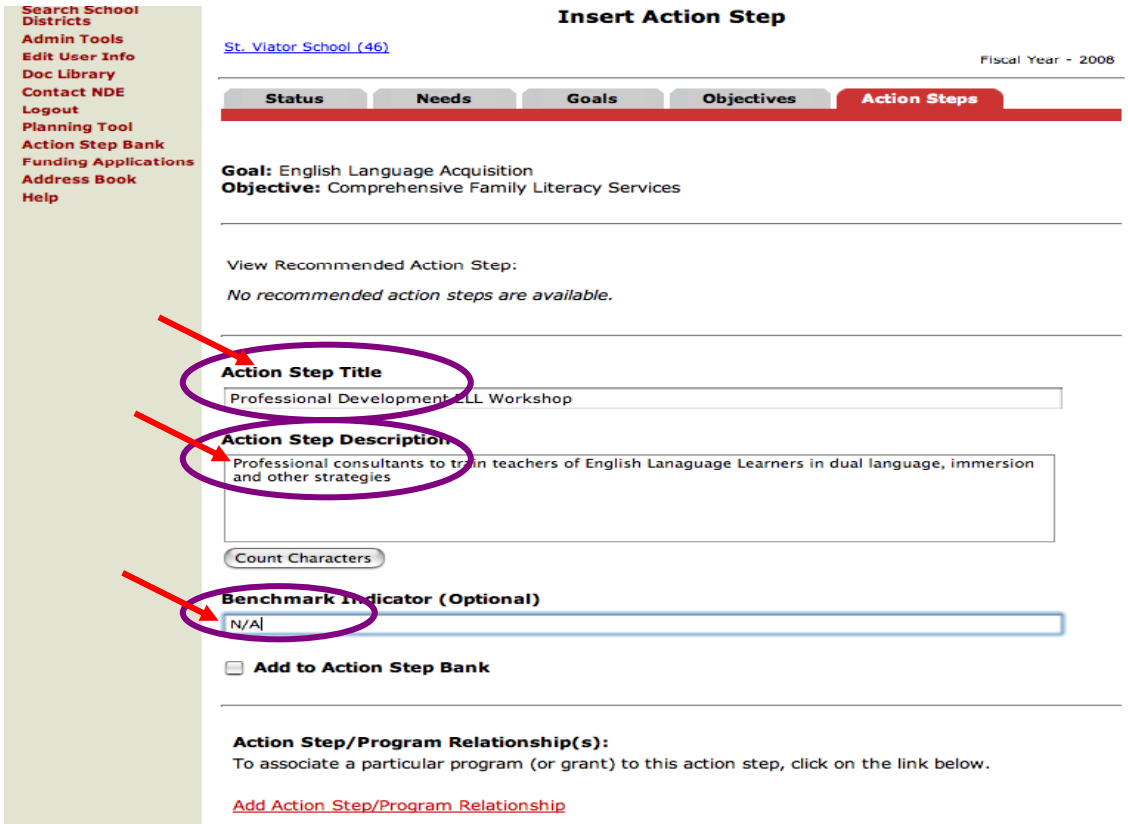
You may either type in your own ***Objective Title, Estimated Cost (Optional)*** and ***Objective Descriptions***, OR you may Click ***View Recommended Objective***. This will populate the page with information stored in ePAGE. Click ***Save***



The next step is to add an ***Action Step***.
Click the red link ***Add Action Step***.



You will be taken to the ***Insert Action Step*** page.
Fill out as appropriate.
Scroll down and Click ***Save***. If desired, you may proceed as follows.

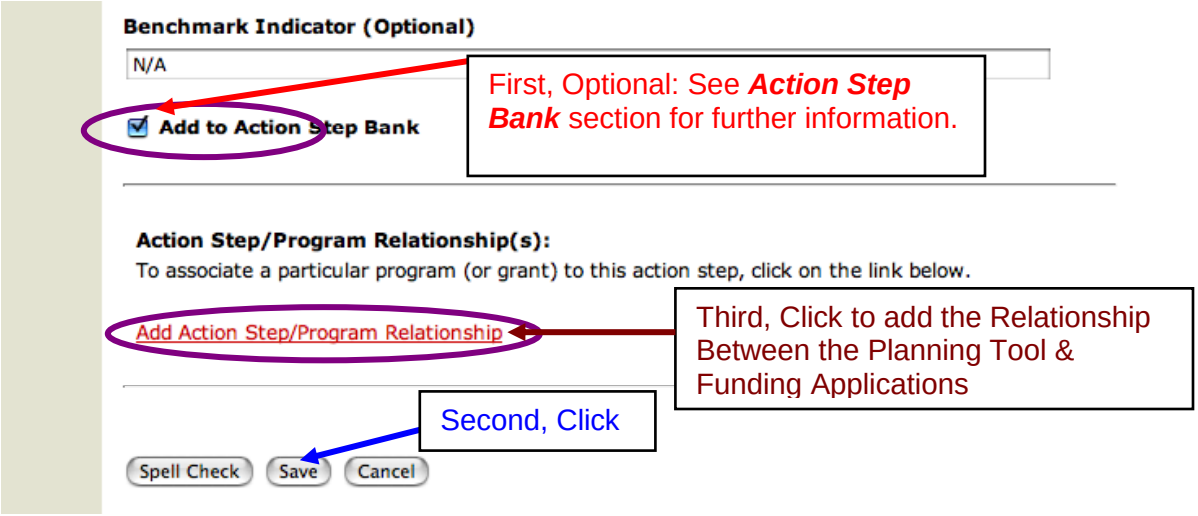


You will notice the checkbox ***Add to Action Step Bank***.

Checking this box will put the newly created ***Action Step*** in the ***Action Step Bank***. See the **Action Step Bank** section for further information.

Click ***Save***

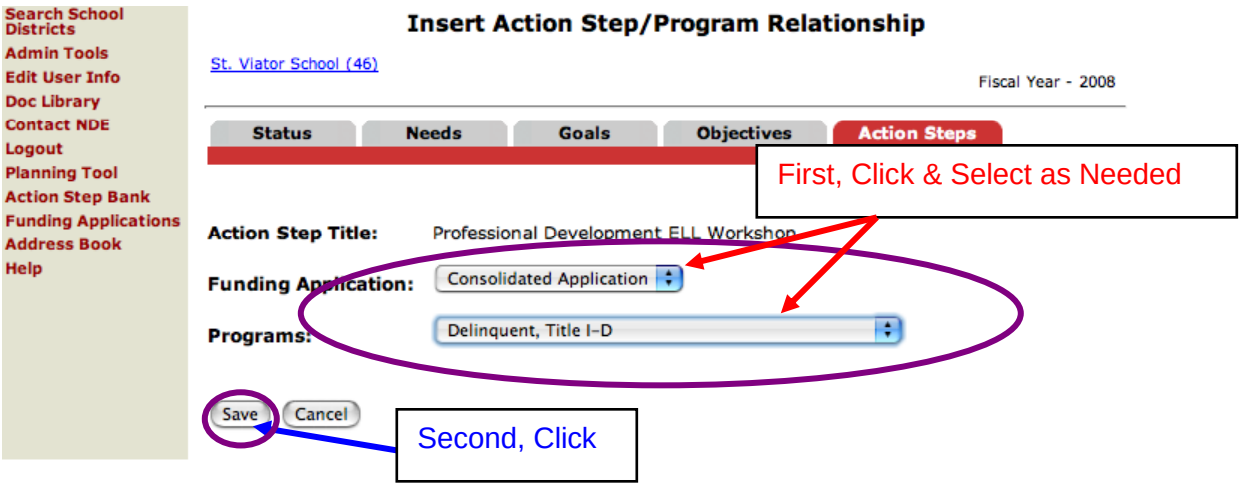
You will also notice a red link ***Add Action Step / Program Relationships***. Click.



You will be taken to the ***Insert Action Step / Program Relationship*** page.

Click ***Funding Application***, then make a selection.

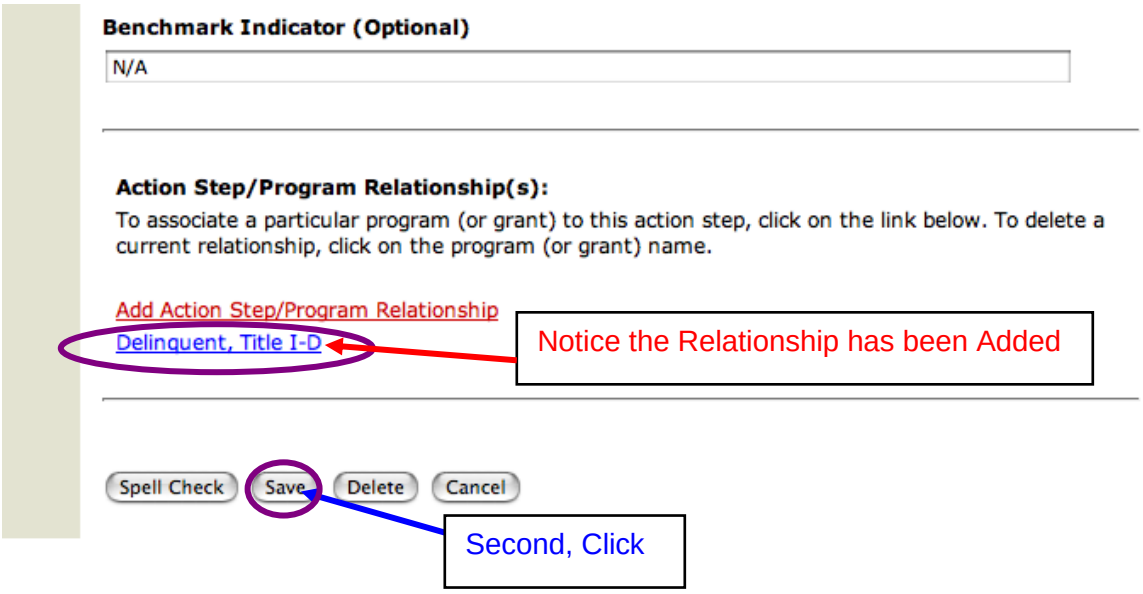
Click ***Programs***, then Click a selection.



Click ***Save***

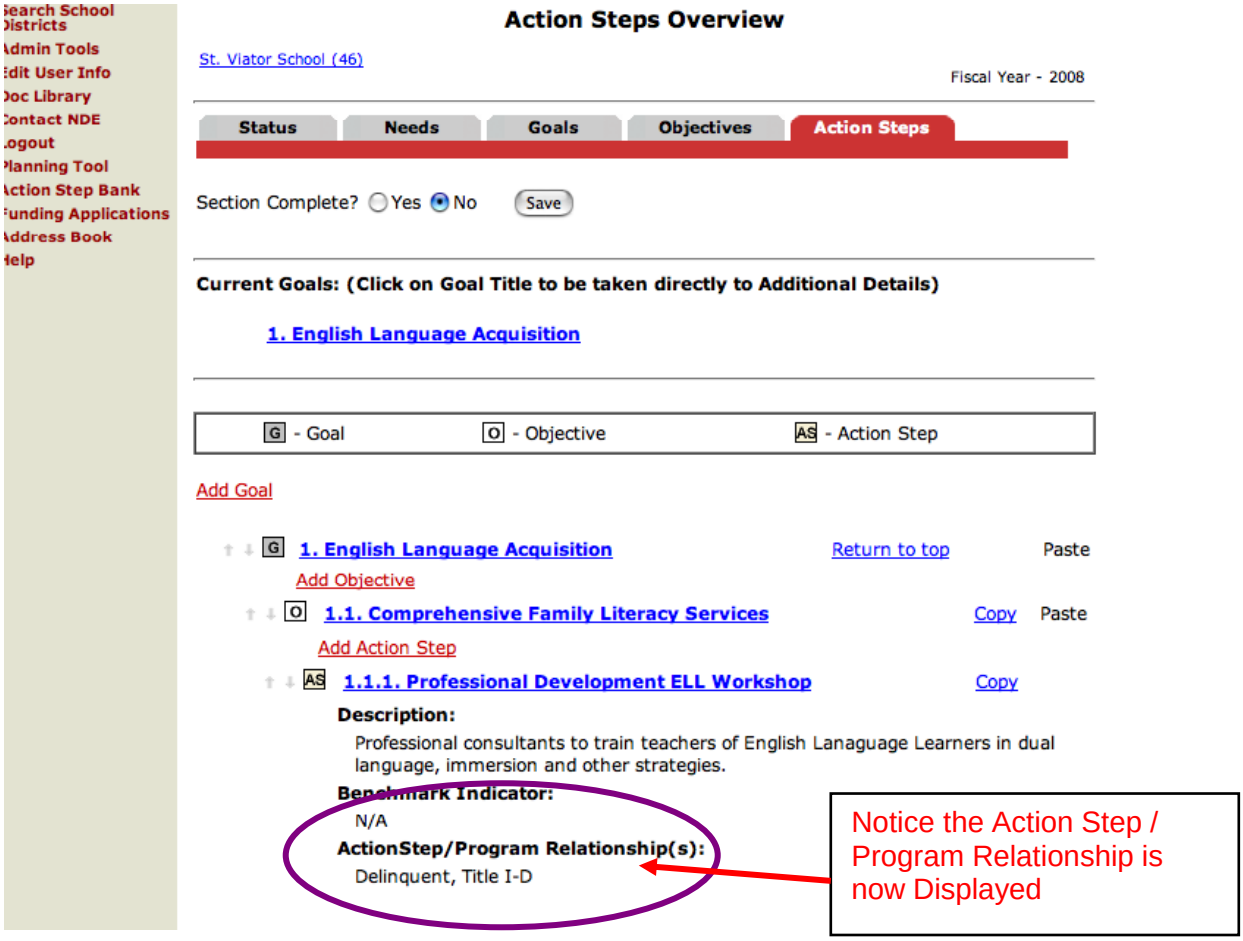
The ***Insert Action Step*** page has become the ***Edit / Delete Action Step*** page. See the following example (only the lower area of the page is displayed).

Notice the ***Action Step / Program Relationship*** created in the last step is now displayed.



Click ***Save*** when done.

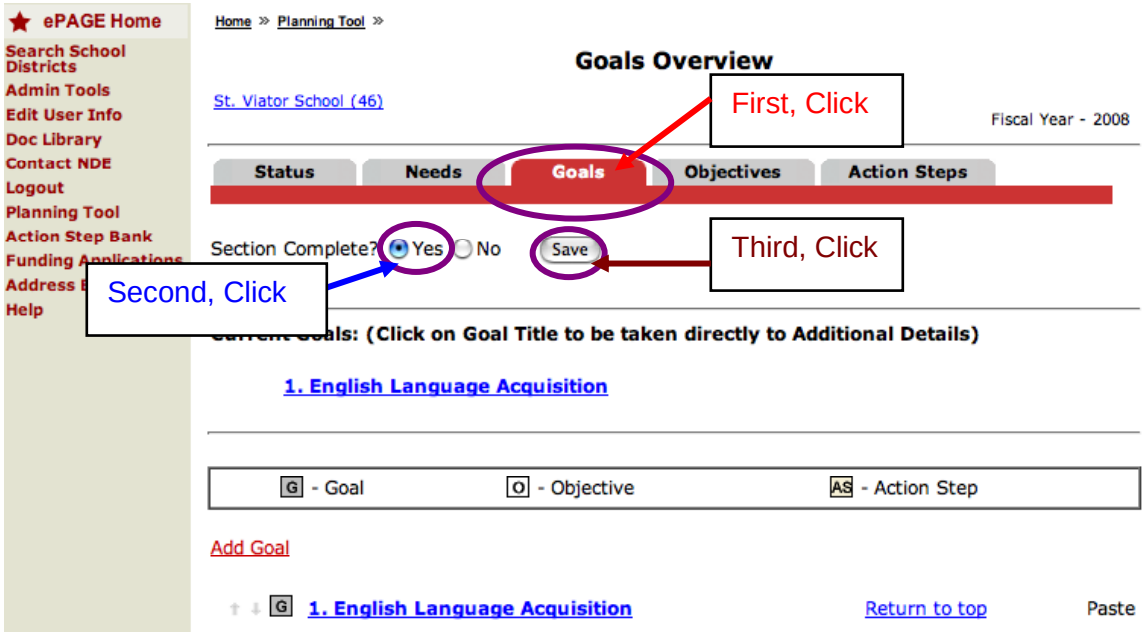
You will be taken to the ***Action Steps Overview*** page. Notice the ***Action Step*** towards the bottom.



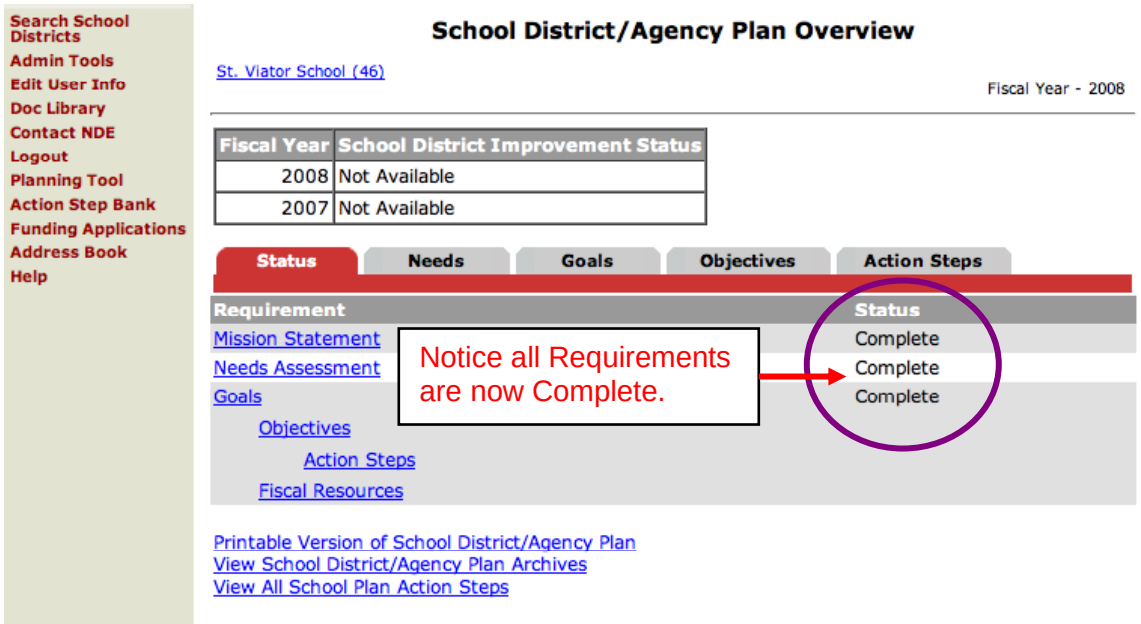
Continue to work on this section, adding & editing (and if necessary, deleting) ***Goals, Fiscal Resources, Objectives***, and ***Action Steps*** as needed.

When done, change ***Section Complete?*** to ***Yes***, as follows:

Click ***Goals***
Click ***Yes*** next to ***Section Complete?***
Click ***Save***

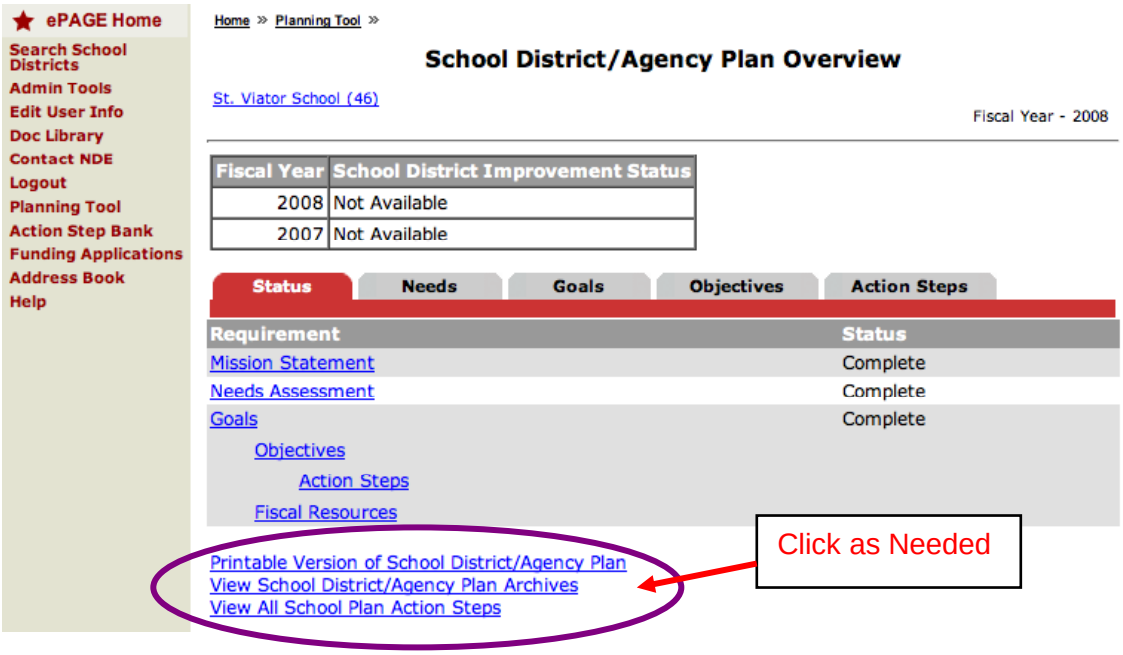


You will notice the status of all Requirements is now ***Section Complete***



Lastly, you may Click any of the 3 blue links below the Requirements to:

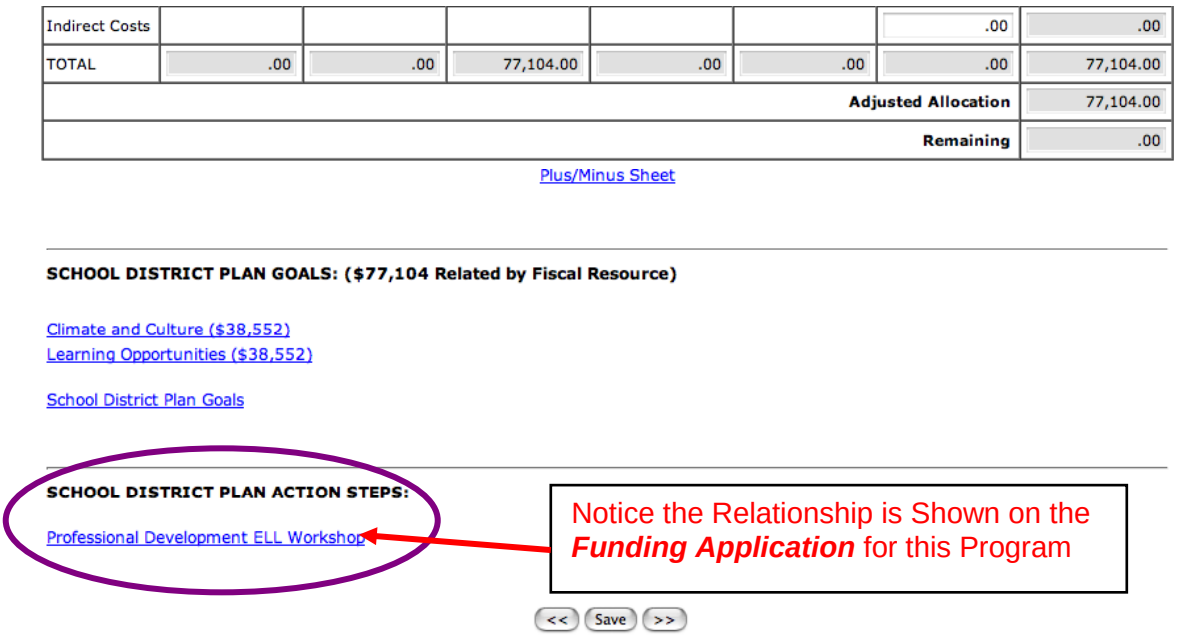
Print School District / Agency Plan
View School District Agency Plan Archives (prior plans in Applications)
View All School District Action Steps



At this point, you are done with the ***School District / Agency Plan***.

The next time you go to ***Funding Applications***, you will be able to view the relationship created with the ***Add Action Step / Program Relationship*** process.

Click ***Funding Applications***
Click the appropriate ***Application***
Click the blue link for the appropriate ***Program***
The following example is towards the bottom of the ***Funding Application, Spending Plan*** for this program.



Indirect Costs						.00	.00
TOTAL	.00	.00	77,104.00	.00	.00	.00	77,104.00
						Adjusted Allocation	77,104.00
						Remaining	.00

Plus/Minus Sheet

SCHOOL DISTRICT PLAN GOALS: ($77,104 Related by Fiscal Resource)

Climate and Culture ($38,552)
Learning Opportunities ($38,552)

School District Plan Goals

SCHOOL DISTRICT PLAN ACTION STEPS:

Professional Development ELL Workshop

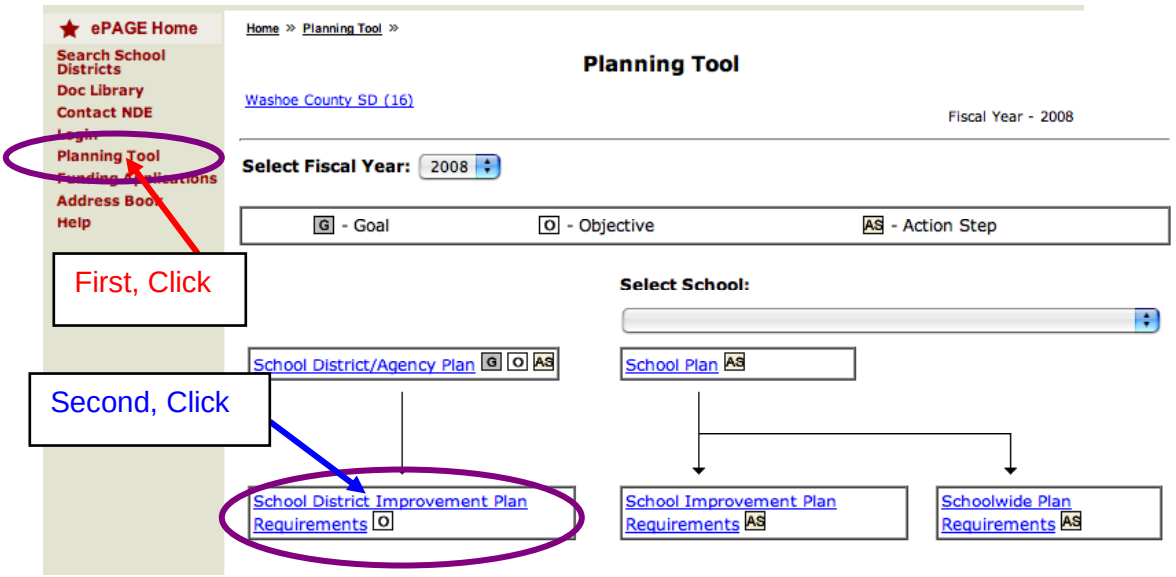
Notice the Relationship is Shown on the ***Funding Application*** for this Program

<< Save >>

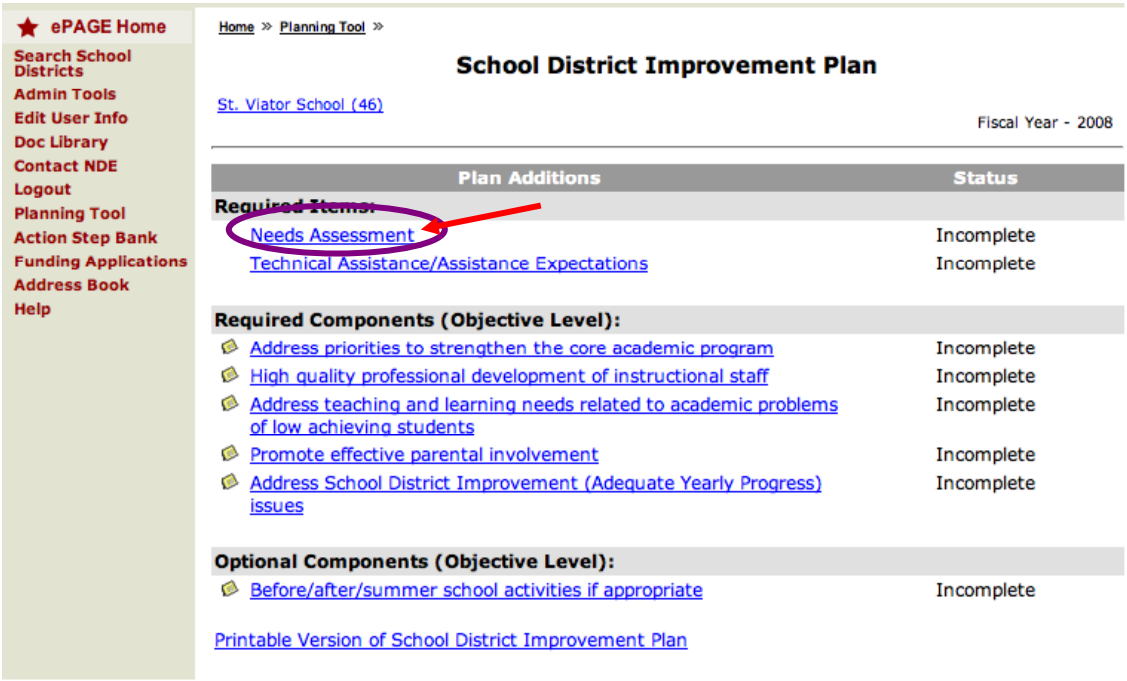
The next step is to complete the **School District Improvement Plan Requirements** section.

School District Improvement Plan Requirements:

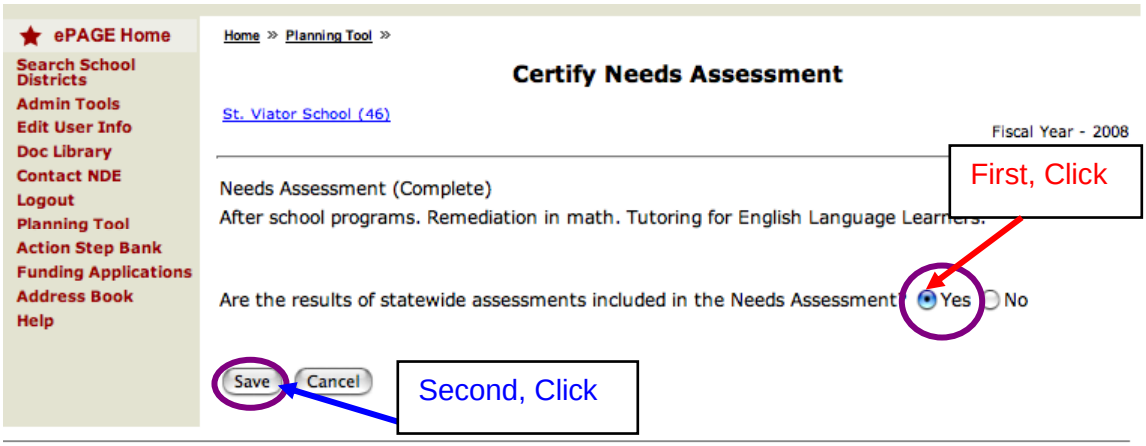
Click ***Planning Tool***
Click the blue link ***School District Improvement Plan Requirements***



You will be taken to the ***School District Improvement Plan*** page.
You will notice the status of these items is Incomplete.
Complete this section in order, by first Clicking the blue link, ***Needs Assessment***.

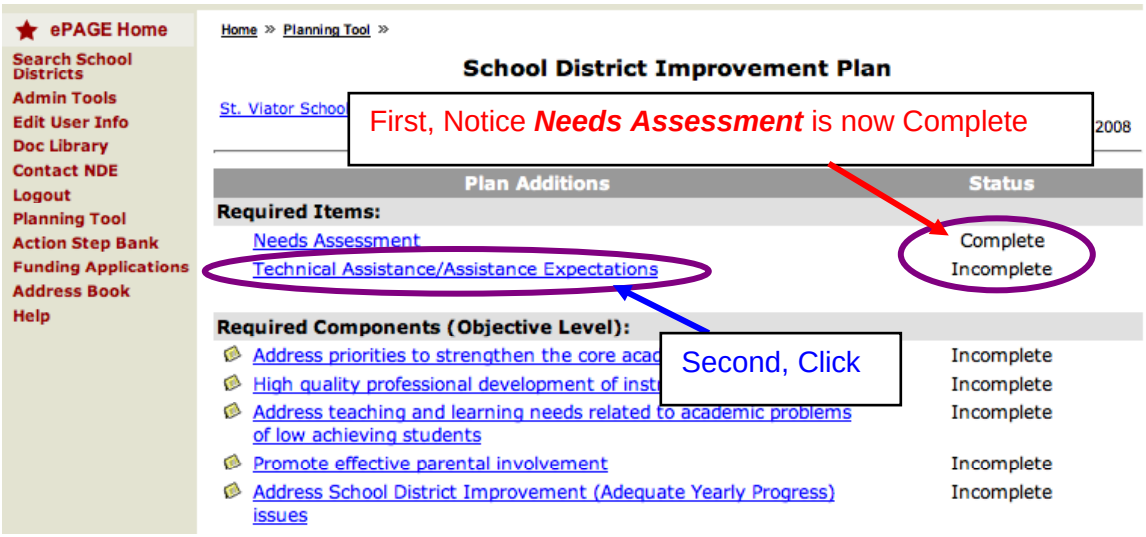


You will be taken to the ***Certify Needs Assessment*** page.
Click ***Yes***
Click ***Save***



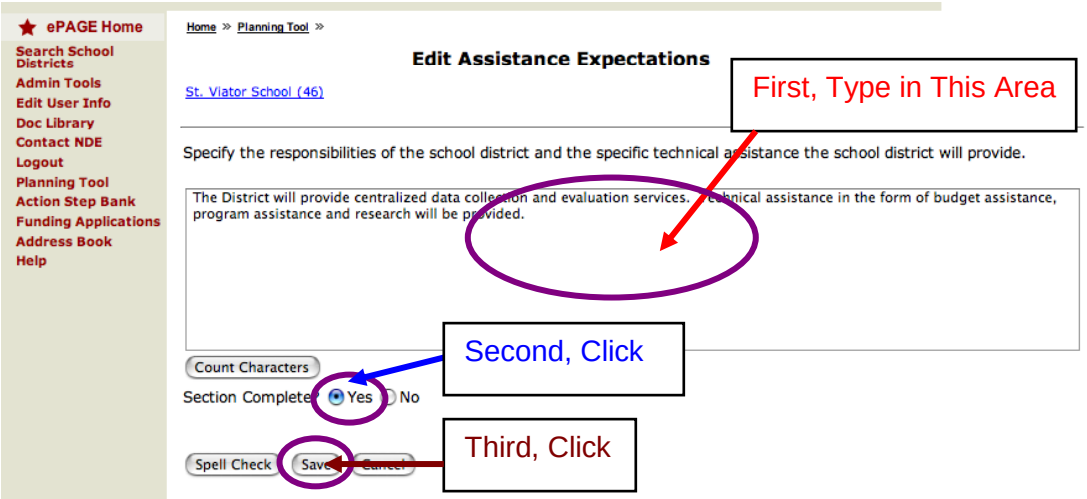
You will be taken back to the ***School District Improvement Plan*** page.

Click the blue link ***Technical Assistance / Assistance Expectations.***



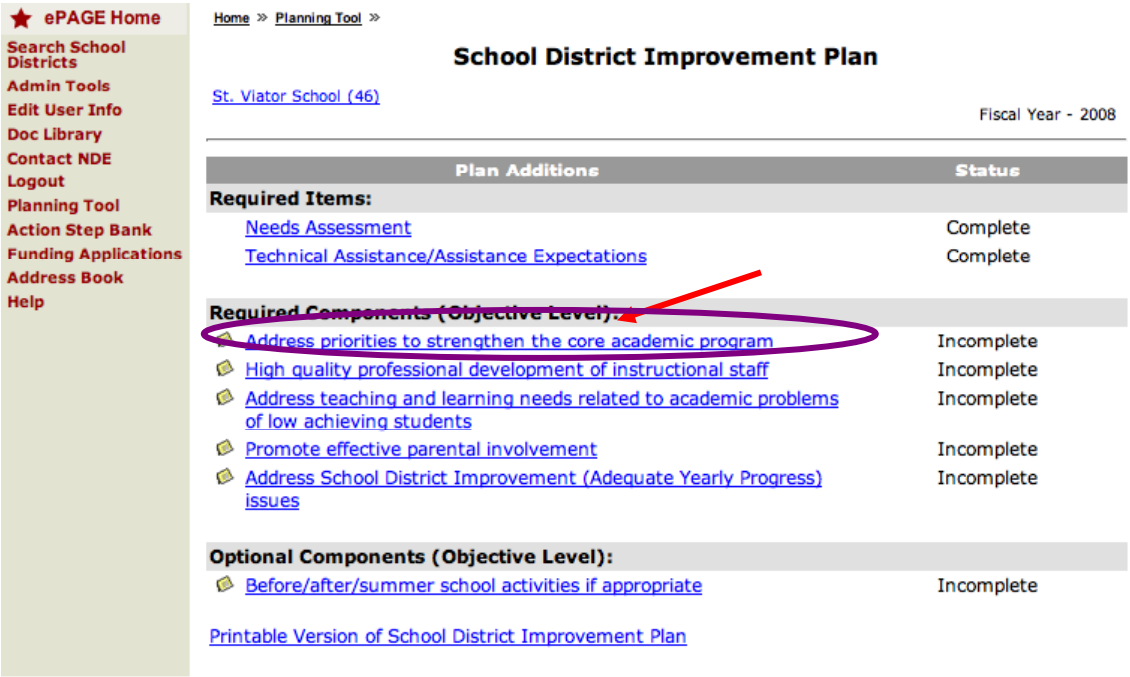
You will be taken to the ***Edit Assistance Expectations*** page.
Complete this page in a similar fashion as other sections above.

Type your response.
Click ***Yes***
Click ***Save***



You will again be taken to the ***School District Improvement Plan*** page.

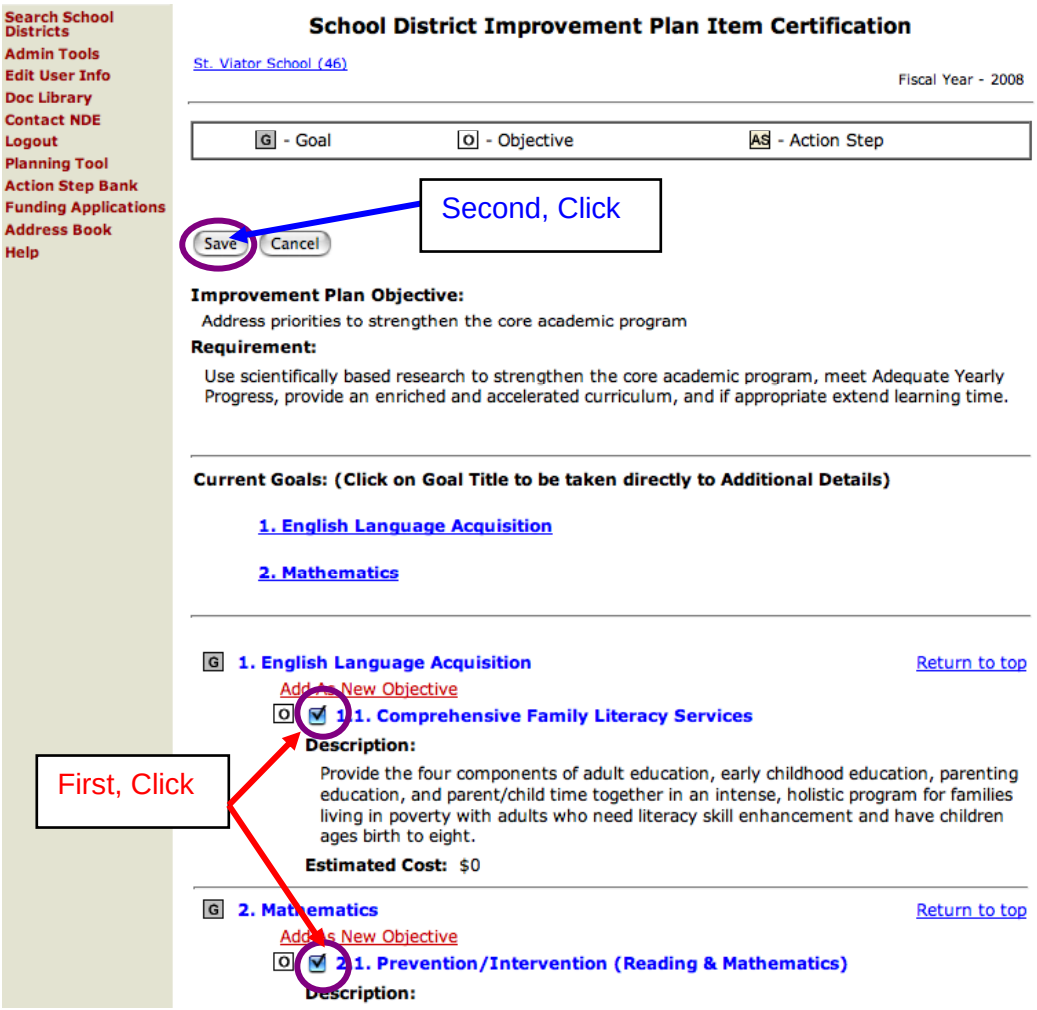
Click the next blue link, ***Address Priorities to Strengthen*** ...



You will be taken to the ***School District Improvement Plan Item Certification*** page.

Click the box next to each ***Objective***

Click ***Save***

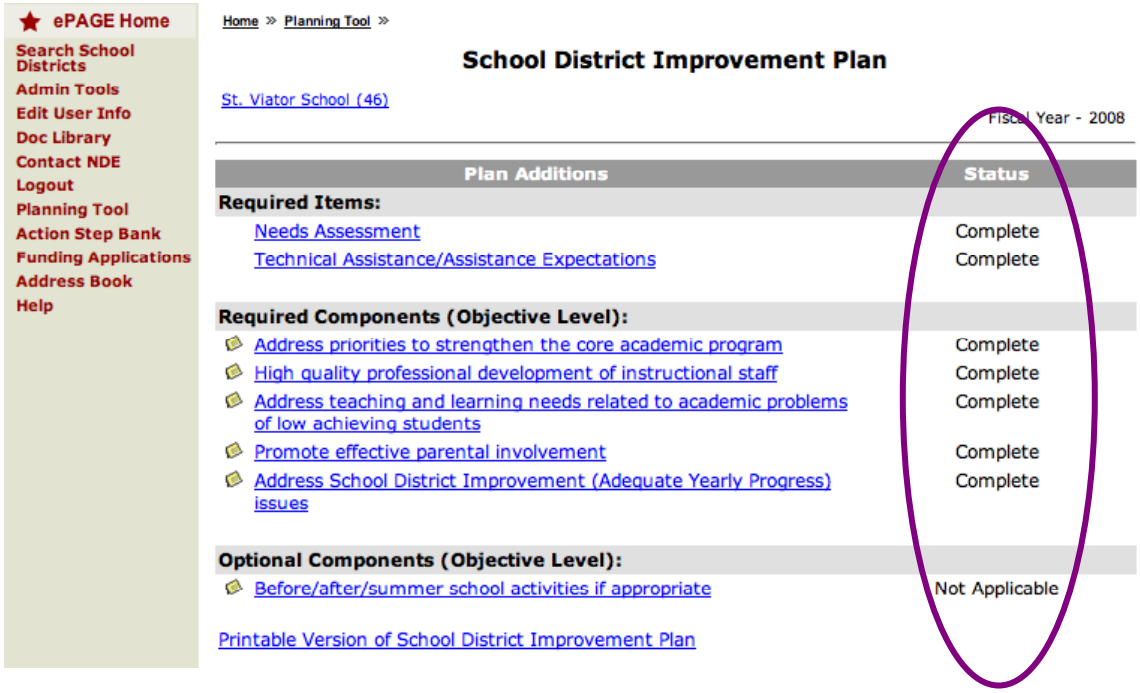


You are again be taken to the ***School District Improvement Plan*** page.

Some of the areas that follow contain red links instead of blue links.

Repeat the processes in this section until all ***Required Items, Required Components*** and ***Optional Components*** (if desired) are completed.

When done, all ***Required Items*** and ***Required Components*** will be in Complete status. Optional Components can be Complete, Incomplete or Not Applicable.

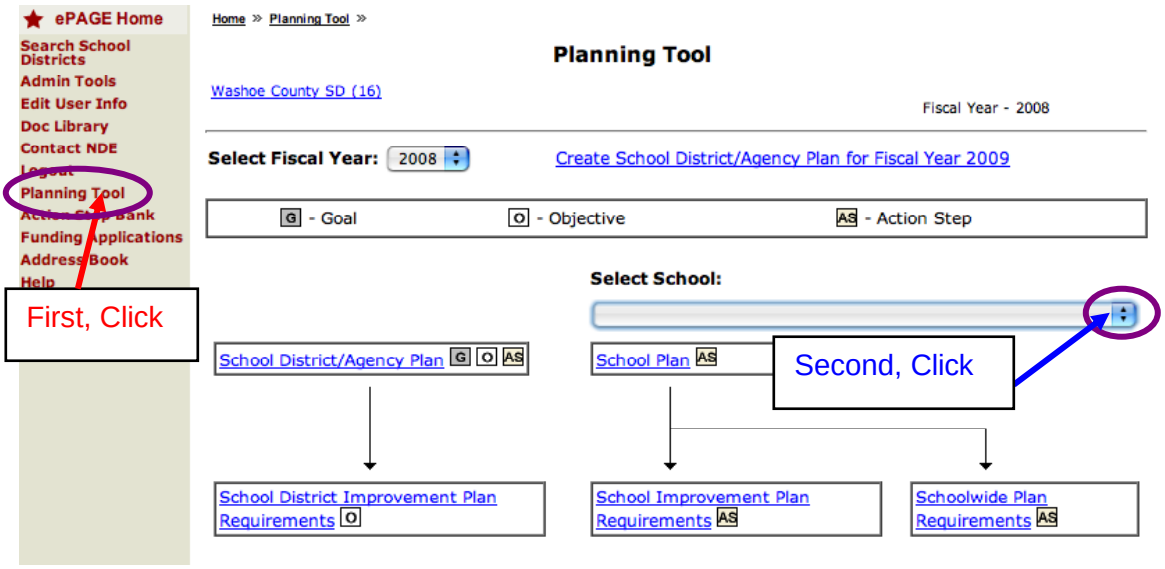


At this point, the ***School District Improvement Plan Requirements*** are complete.

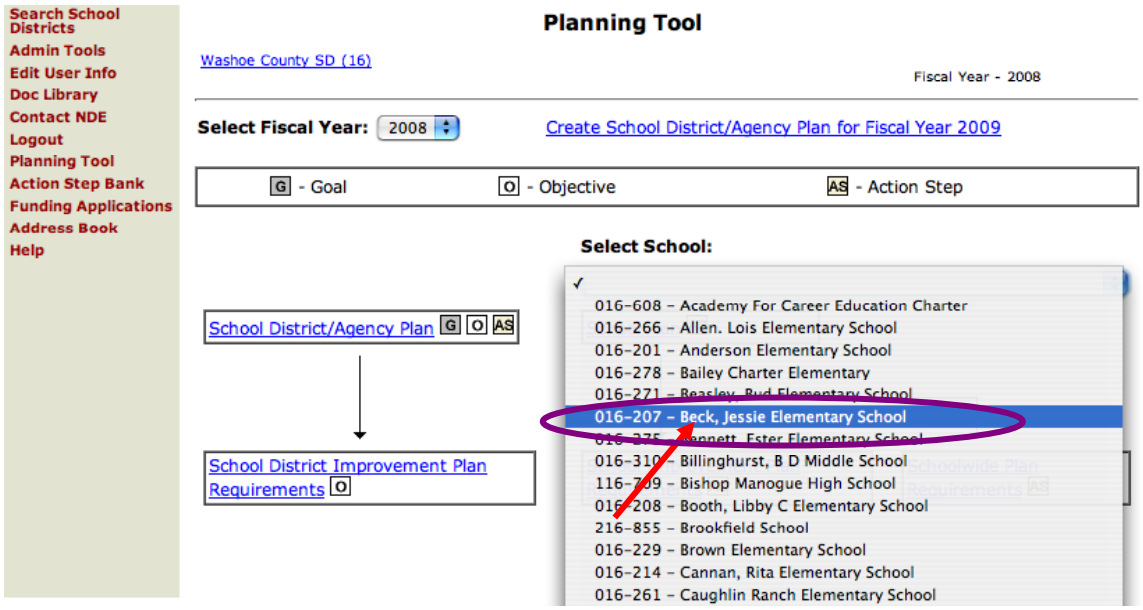
The next step is to go to the ***School Plan***, as applicable.

School Plan:

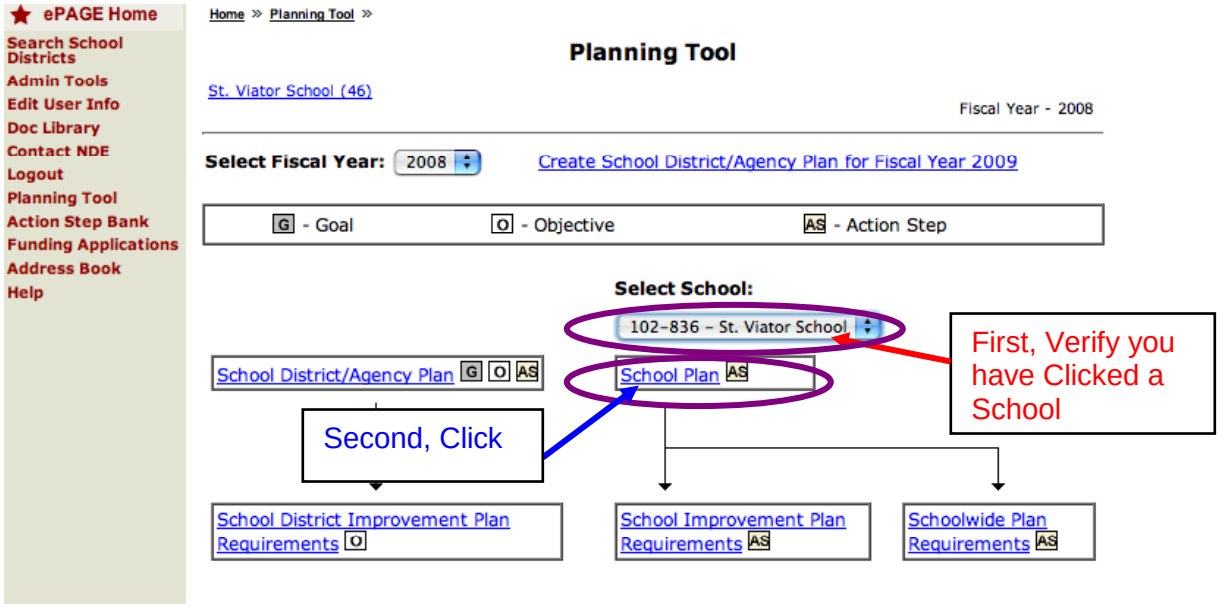
Click ***Planning Tool***
Click ***Select School***



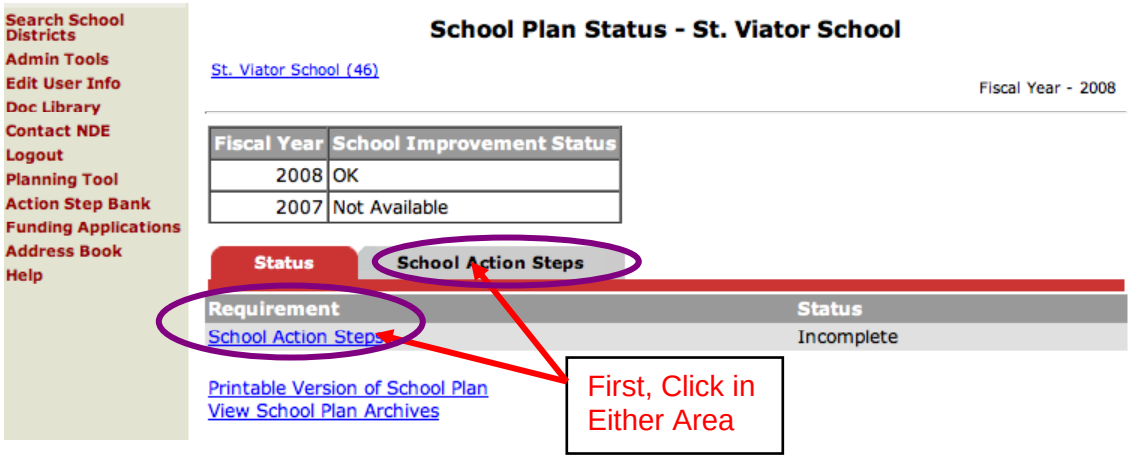
Click a school from the resulting menu.



*** In order to work in ***School Plan, School Improvement Plan*** or ***Schoolwide Plan Requirements***, a school must be selected. If not, you will receive a pop up message stating “Please select a school from the drop down above”. ***

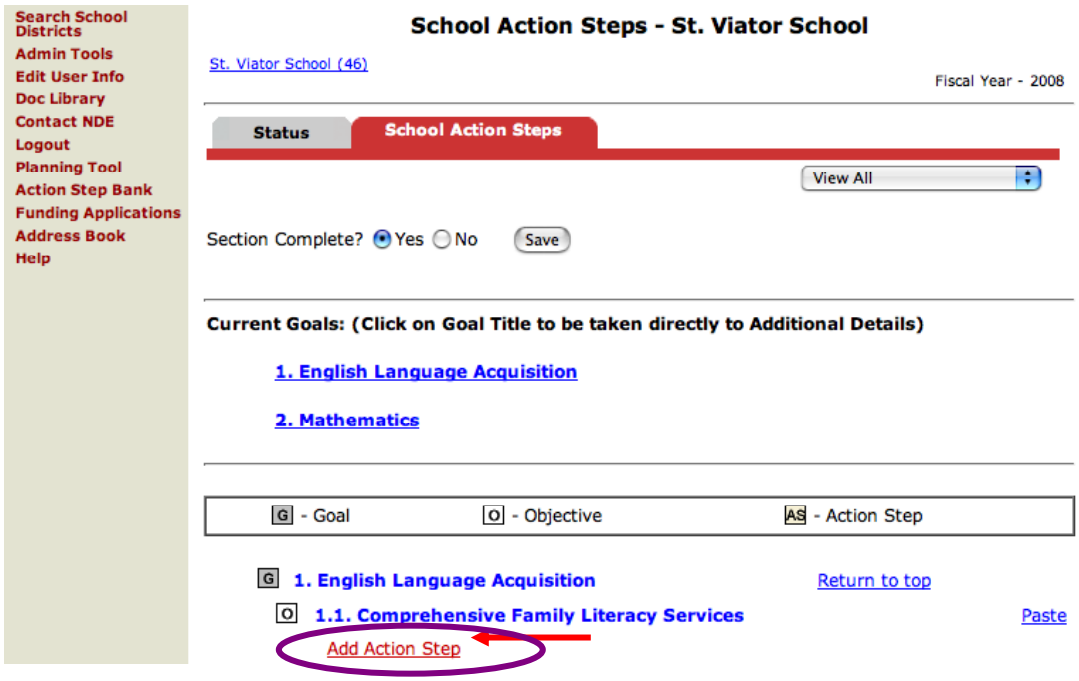


You will be taken to the ***School Plan Status*** page. Notice status is Incomplete. Select ***School Action Steps*** at either the blue link or the grey menu.

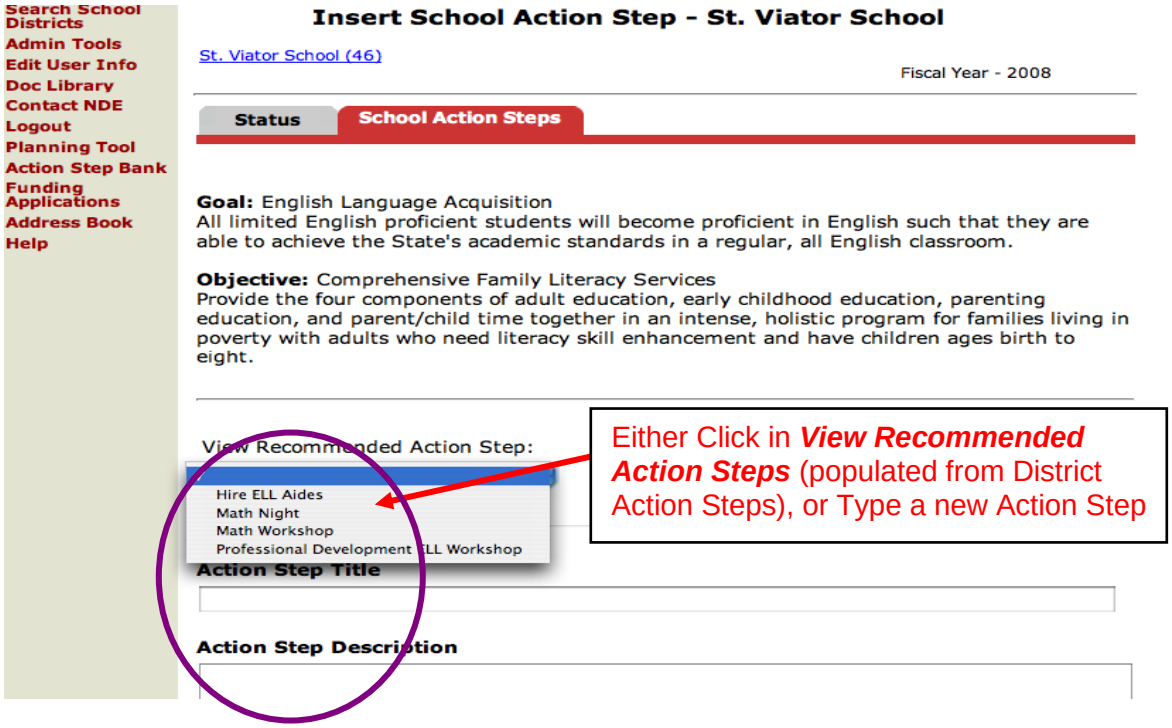


You will be taken to the ***School Action Steps*** page.

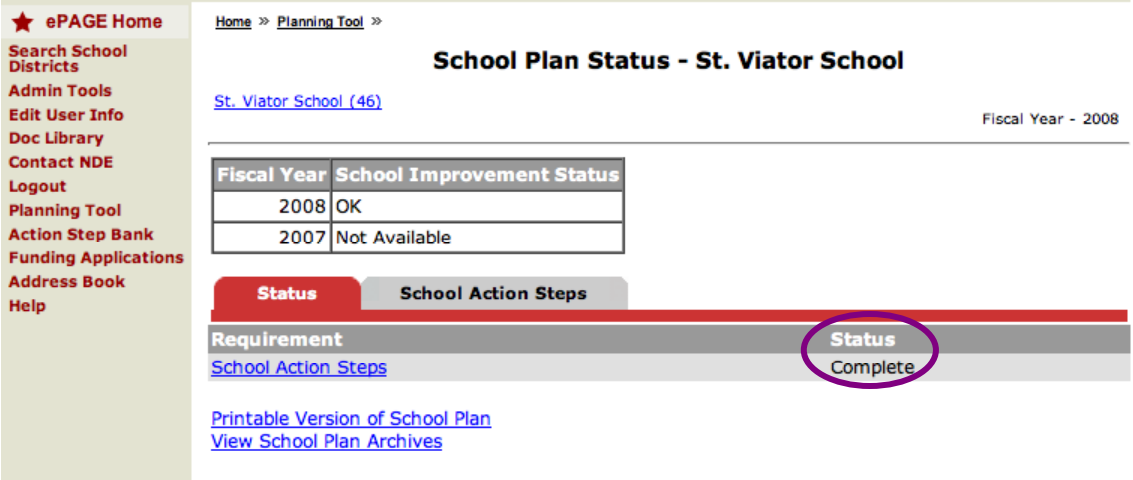
Click ***Add Action Steps***. Fill out as appropriate, with similar methods used at the district level above.



You will be taken to the ***Insert School Action Step*** page.
Either Click ***View Recommended Action Step***, or create a new ***Action Step***



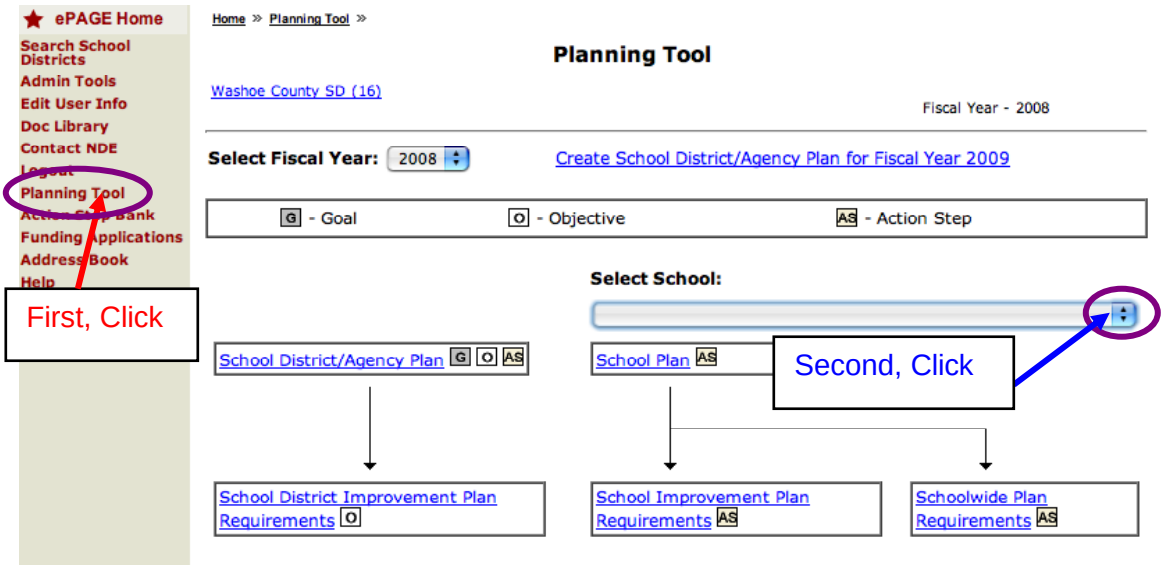
At this point the ***School Plan*** status is complete.



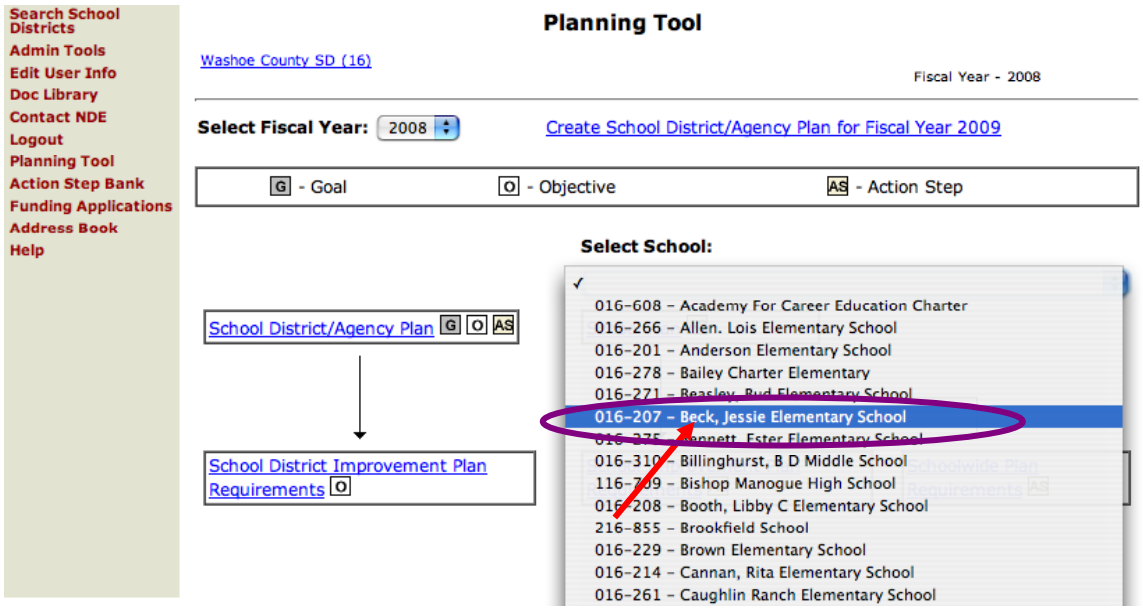
The next step is ***School Improvement Plan Requirements***.

School Improvement Plan Requirements:

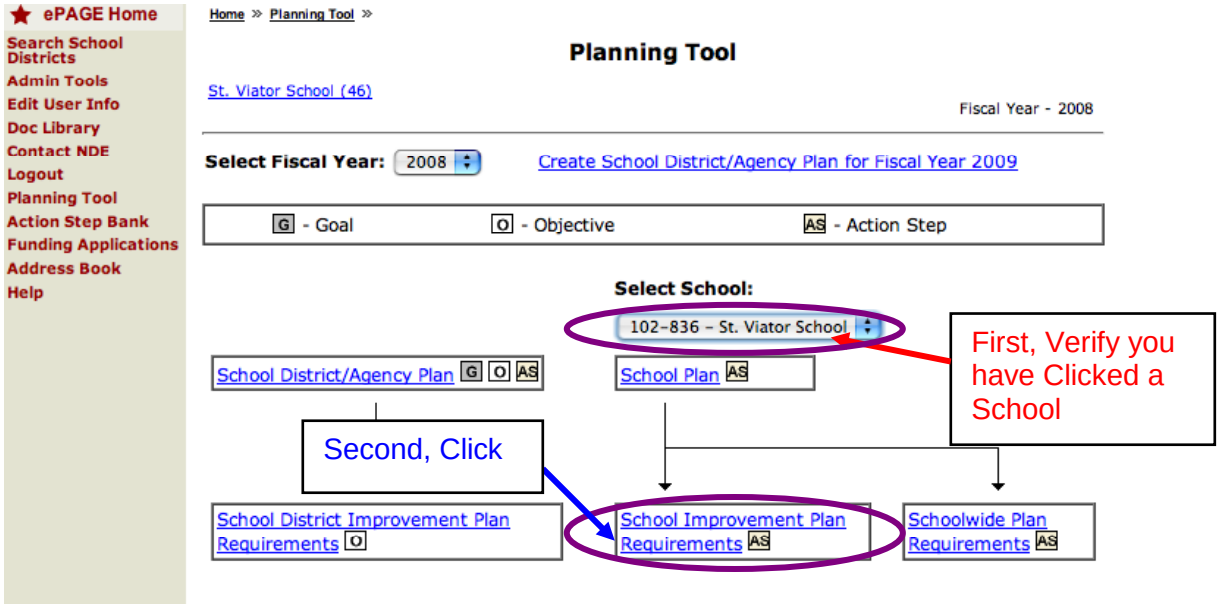
Click ***Planning Tool***
Click ***Select School***



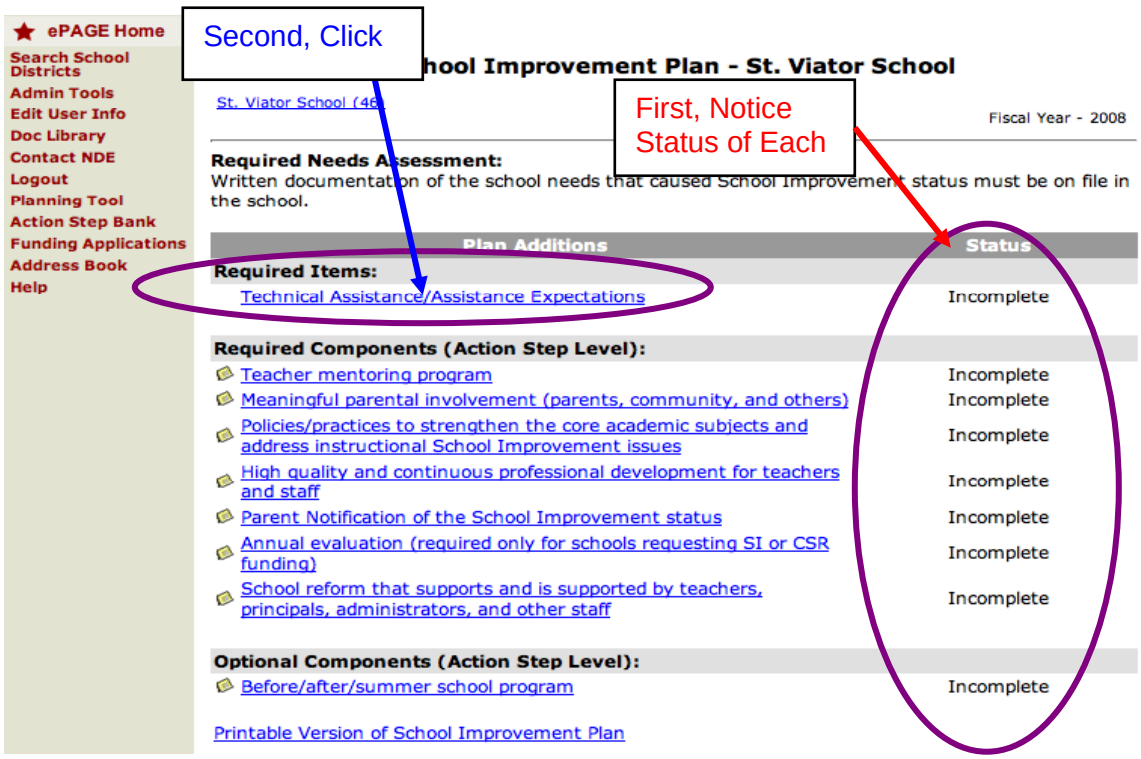
Click a school from the resulting menu.



*** In order to work in ***School Plan, School Improvement Plan*** or ***Schoolwide Plan Requirements***, a school must be selected. If not, you will receive a pop up message stating “Please select a school from the drop down above”. ***

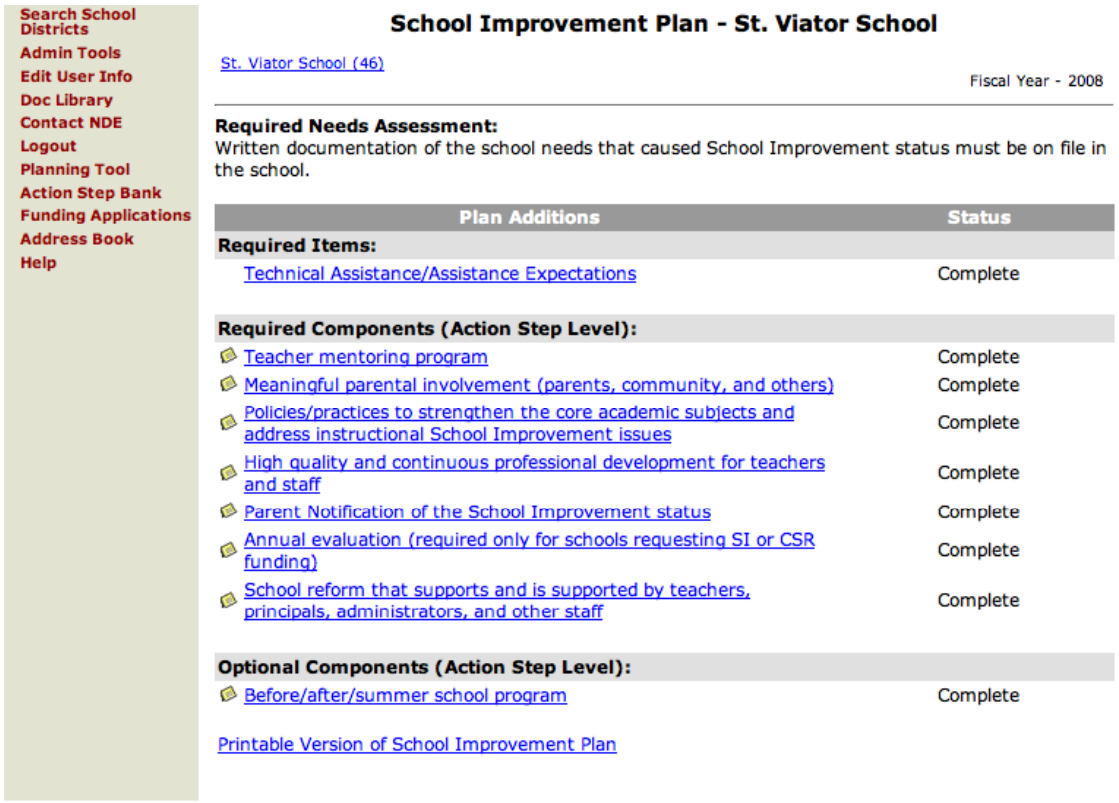


You will be taken to the ***School Improvement Plan*** page for this school. Notice status is Incomplete.
Click the blue link for ***Technical Assistance / Assistance Expectations***.



Click each subsequent blue link, completing in a similar fashion to other areas in this section.

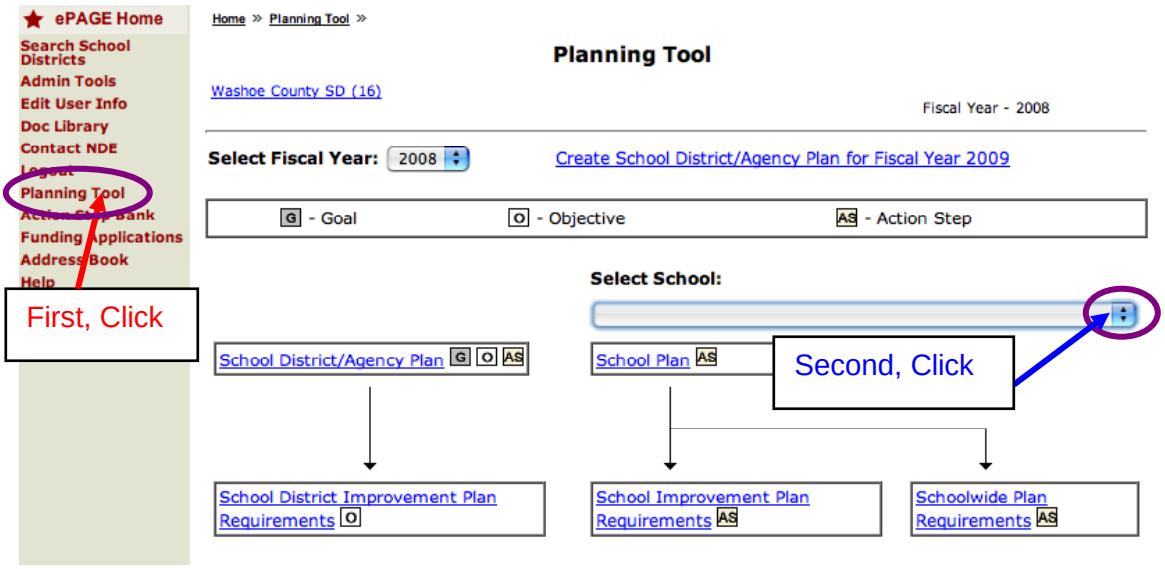
At this point, the ***School Improvement Plan*** (School Level) is complete.



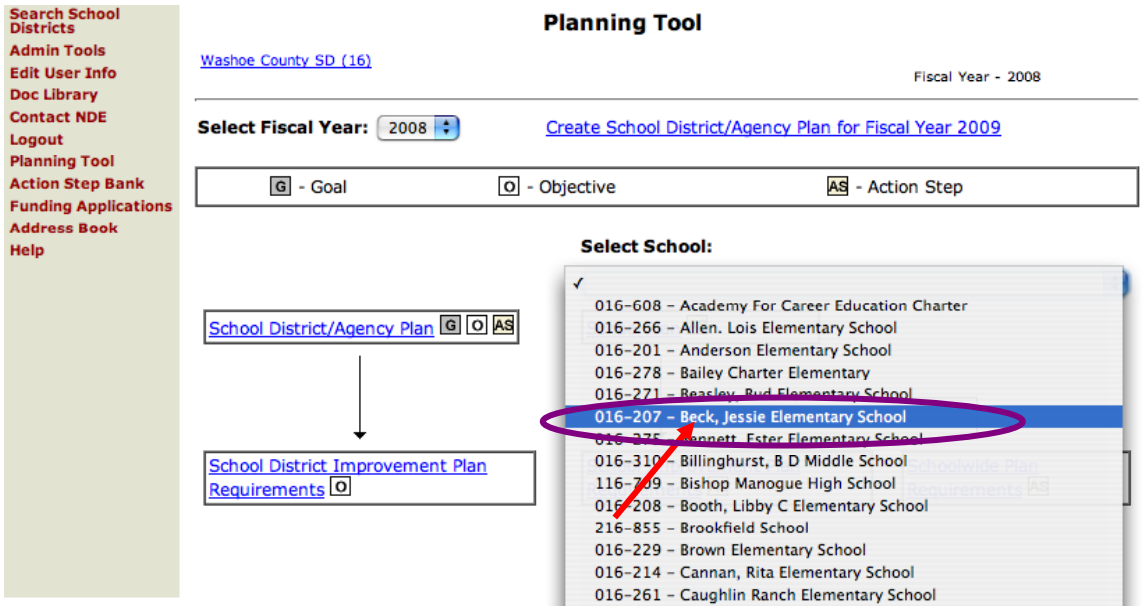
If you have a new Schoolwide program, proceed to the the last section in the ***Planning Tool, Schoolwide Plan Requirements***.

Schoolwide Plan Requirements:

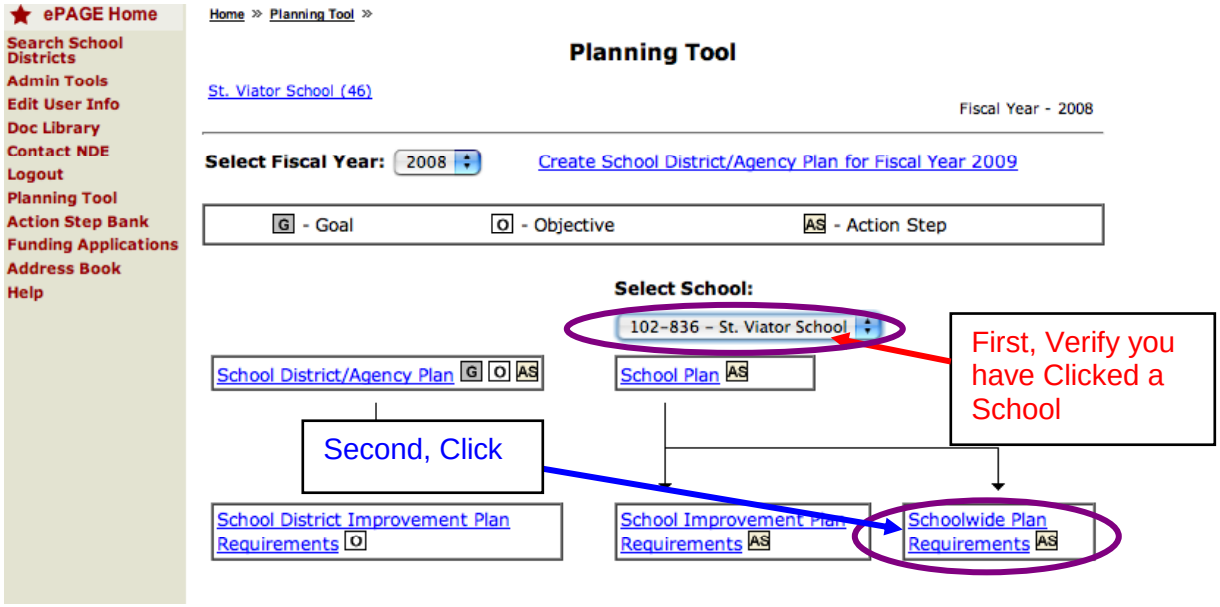
Click ***Planning Tool***
Click ***Select School***



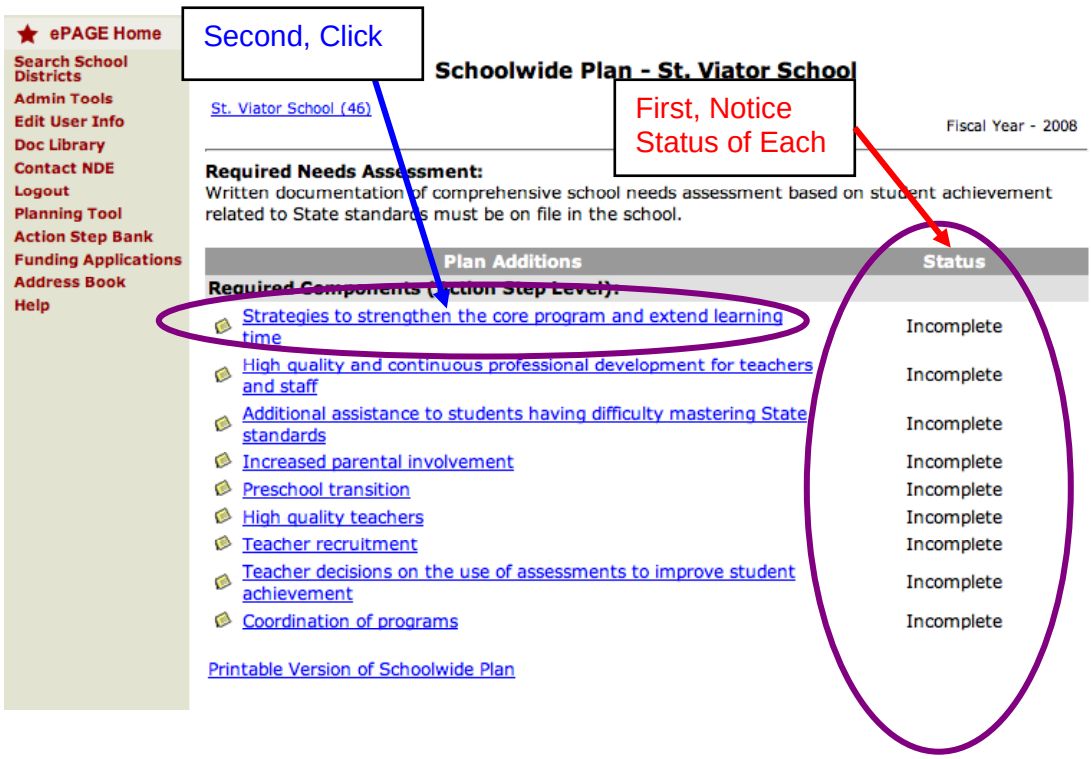
Click a school from the resulting menu.



*** In order to work in ***School Plan, School Improvement Plan*** or ***Schoolwide Plan Requirements***, a school must be selected. If not, you will receive a pop up message stating “Please select a school from the drop down above”. ***

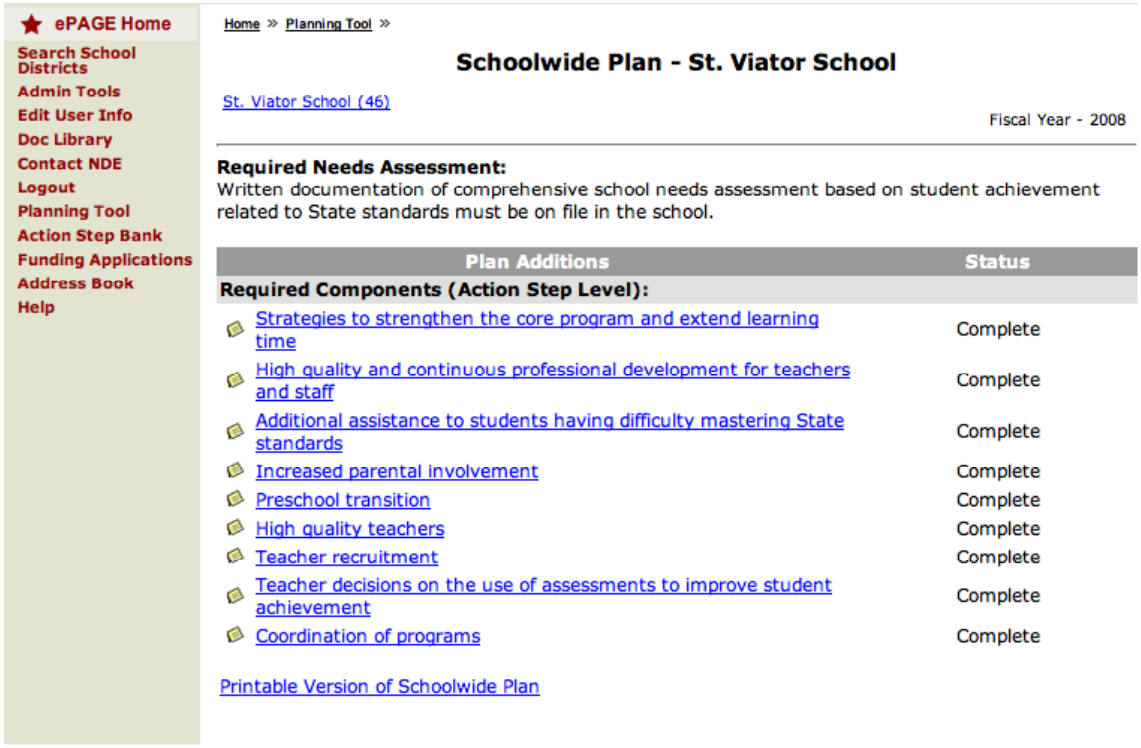


You will be taken to the ***Schoolwide Plan*** page for this school. Notice status is Incomplete.
Click the blue link for ***Strategies to Strengthen …***



Click each subsequent blue link, completing in a similar fashion to other areas in this section.

At this point, the ***Schoolwide Plan*** (School Level) is complete.



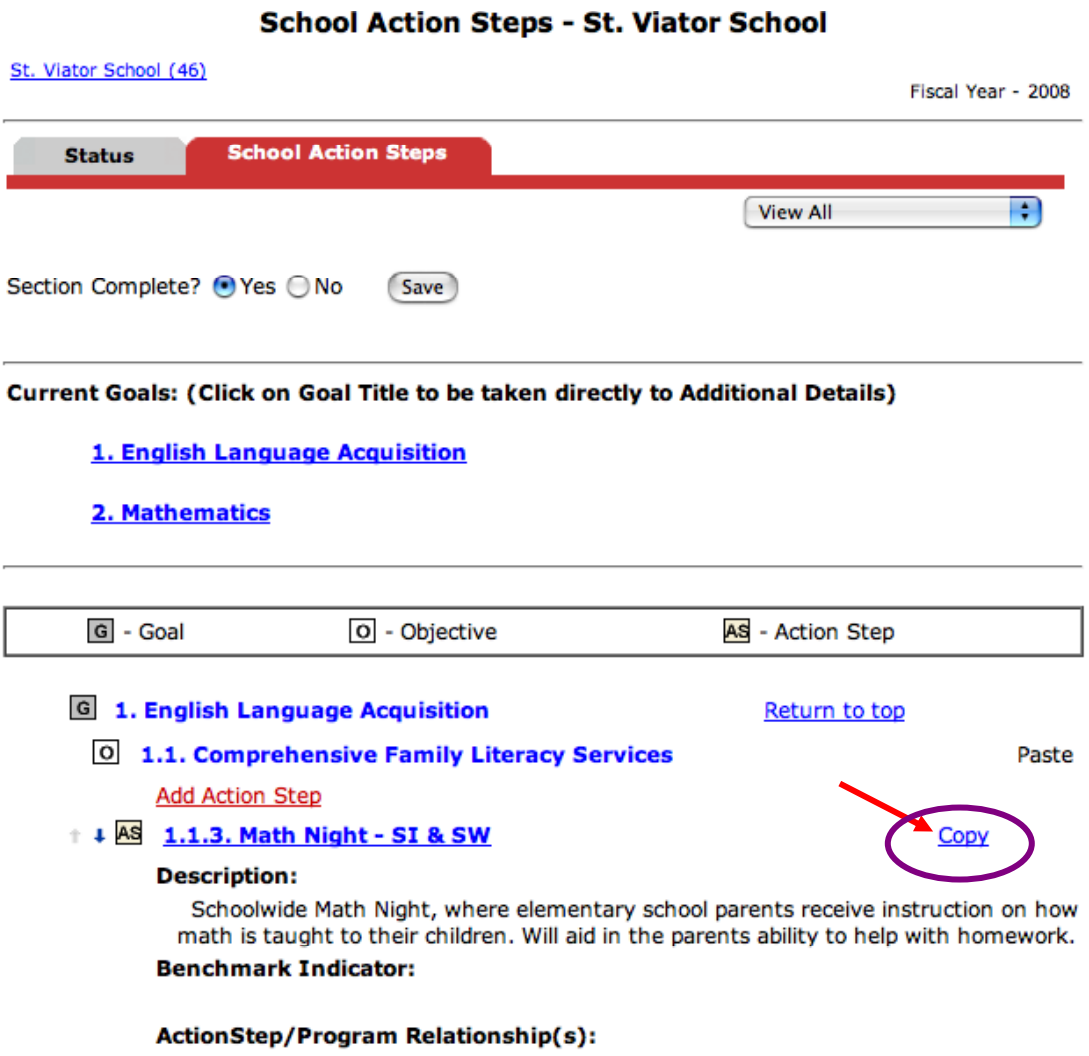
At this point, all areas of the ***Planning Tool*** are complete.

Copy & Paste an Action Step:

The ***School District / Agency Plan*** and the ***School Plan*** allow you the time saving option of copying an ***Action Step*** for use with another ***Objective***.

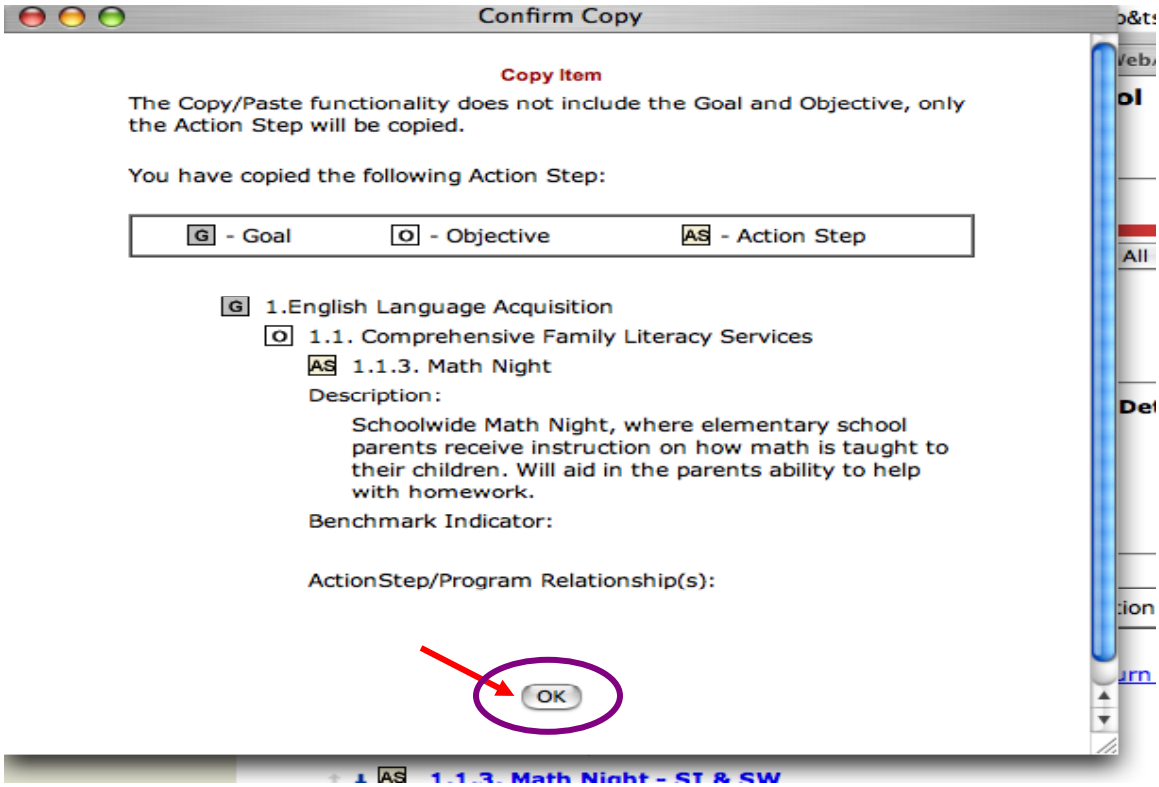
From the ***Action Step*** page of either District or School, notice the blue link Copy next to the ***Action Step***.

Click the blue link to Copy this ***Action Step***.

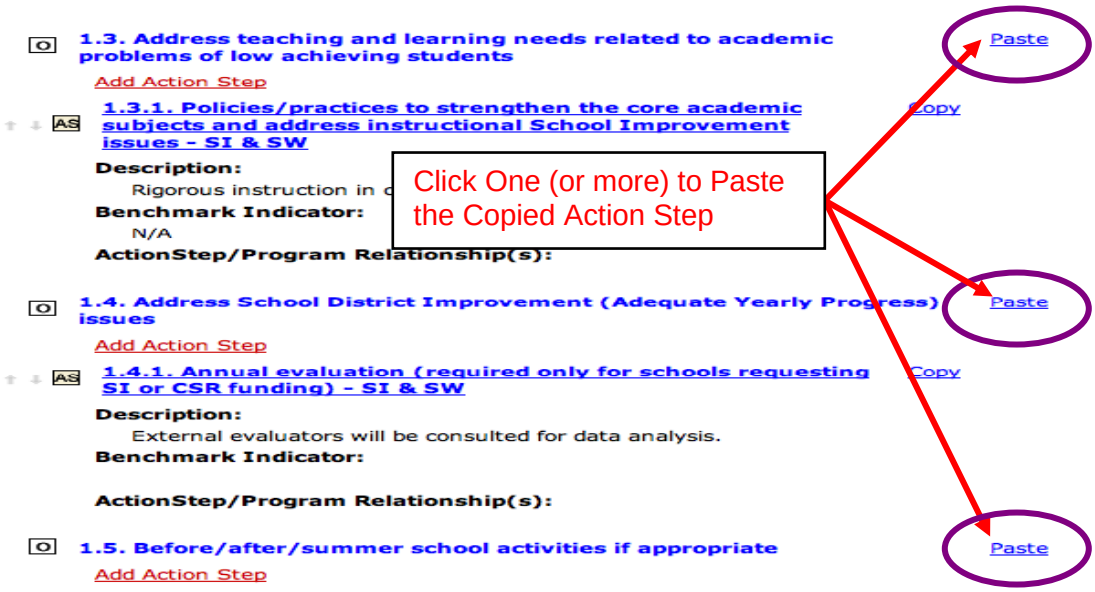


A pop up menu will appear similar to the following example.

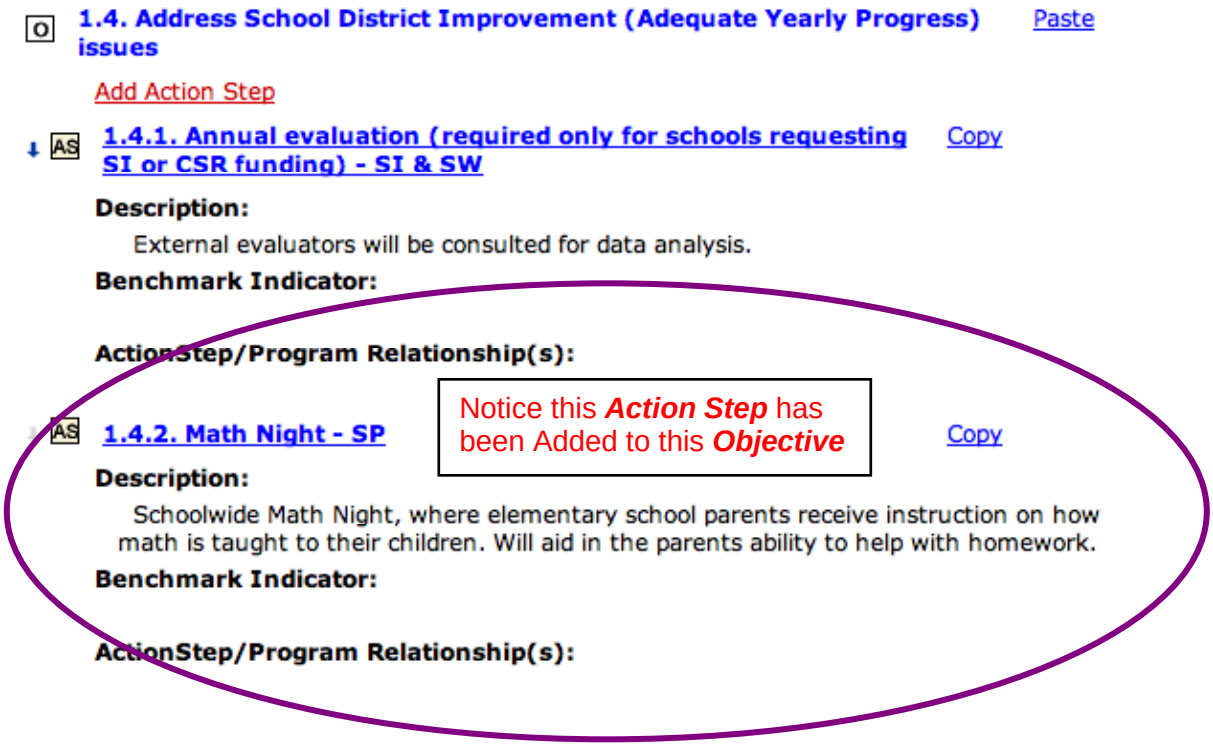
Click OK



You will notice ***Paste*** is now a blue link option next to other ***Objectives***.



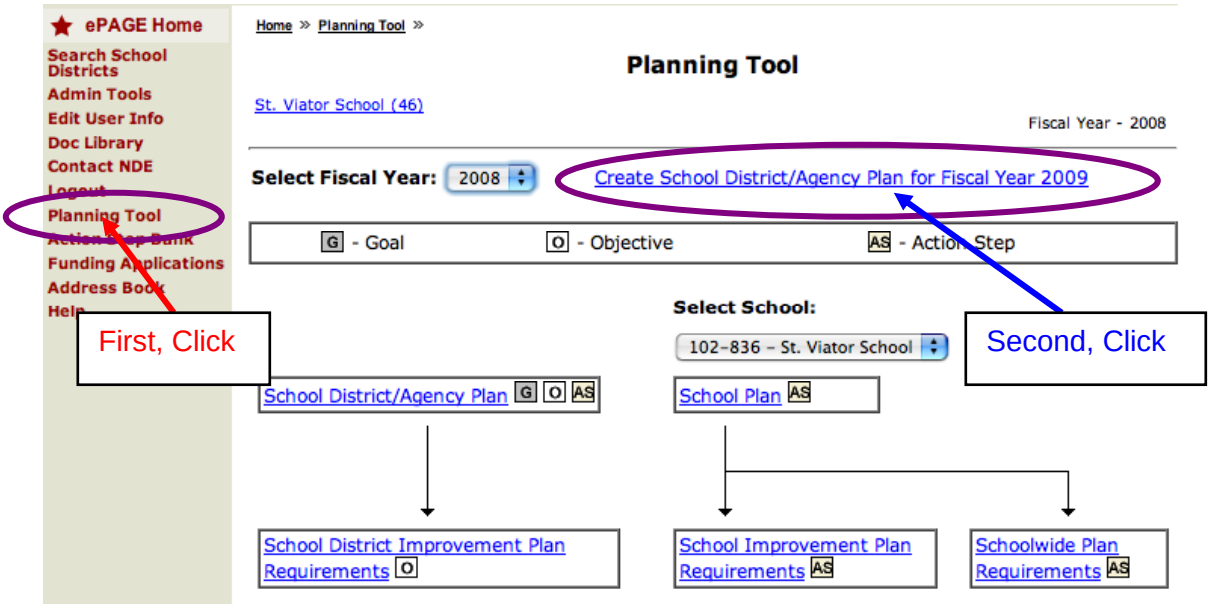
In the example that follows, we added the Action Step to Objective 1.4



You may continue to use these ***Cut & Paste*** procedures to quickly and easily copy ***Action Steps*** from one ***Objective*** to another ***Objective***.

Preparing for the Next Fiscal Year:

Click ***Planning Tool***
Click ***Create School District / Agency Plan for Fiscal Year 2009***



You will see a pop up menu similar to the following example:

***** Be very careful that you want to create the next year plan at this time *****

Click ***OK***

Logout at the left menu bar.

Login the next day at the left menu bar. The ***Planning Tool*** for the next fiscal year will be available. The ***Planning Tool*** information from the current fiscal year will be copied to the next fiscal year. You will use the same processes described in this section to add items (***Goals, Objectives, Fiscal Resources*** and ***Action Steps***).

If you wish to modify an item:

Click the item link
Edit
Click ***Save***.

For items that are no longer applicable and should be deleted:

Click the item link
Click ***Delete***
Click ***Save***.

When done with all ***Planning Tool*** functions, ***Logout*** as normal at the left menu bar.

List of Selected Help Topics in the Planning Tool: These are also found in ePAGE by Clicking ***Help*** when on the appropriate page.

What is the status page?

The status page shows users what parts of their plan are complete and what areas need to be completed AND it allows LEAs to view a printable version of the District plan and to create archived versions of the plan.

When must the District Improvement plan be created?

Districts need to create a District Improvement Plan Addition within 3 months of being identified by NDE as being in District Improvement status.

Are the links on the tabs the same as the ones in the table?

Yes, accessing sections in more than one ways is a feature of the site.

What does the print function do?

The print function creates a full printable view of the entire District/Agency Plan in a printer friendly format.

What does the archive function do?

The archive feature allows a district to take a snapshot of its plan for future review and create copies of the plan that can be viewed by the general public.

How is a Goal added to the Planning Tool?

Click the Add Goal link, then enter text. To use Goals suggested by the Nevada Department of Education:
1. Click the View Recommended Goals link from the Add a Goal page.
2. Select a Goal from the drop down box.
3. Click the Use button. The information will be loaded into the proper fields where LEAs can then edit the goal to meet their needs.

How is a Goal modified?

Click the desired Goal to be edited, then enter your changes.

How can a Goal be deleted?

Click the Goal to be deleted and then click the Delete button. Districts cannot delete Goals that have School Plan Action Steps associated with them. Deleting

these Goals would invalidate the School Plans.

How can an Objective be added to the Planning Tool?

Click the Add Objective link under the desired Goal the Objective. To use Objectives suggested by the Nevada Department of Education:
1. Click the View Recommended Objectives link.
2. Select an Objective from the drop down box.
3. Click the Use button. The information will be loaded into the proper fields where LEAs can then edit the Objective to meet their needs.

How is an Objective added to the Planning Tool?

Click the Add Objective link under the desired Goal the Objective. To use Objectives suggested by the Nevada Department of Education:
1. Click the View Recommended Objectives link.
2. Select an Objective from the drop down box.
3. Click the Use button. The information will be loaded into the proper fields where LEAs can then edit the Objective to meet their needs.

How can an existing Objective be modified?

Click the Objective to be edited, then make editorial changes. Care should be taken when editing Objectives that have School Plan Action Steps associated with them.

How is an existing Objective modified?

Click the Objective to be modified, then make editorial changes. Care should be taken when editing Objectives that have School Plan Action Steps associated with them.

How can an Objective be deleted?

Click the Objective to be removed and then click the Delete button. Districts cannot delete Objectives that have School Plan Action Steps associated with them. Deleting these Objectives will invalidate the school plan.

How is an Objective deleted?

Click the Objective to be removed and then click the Delete button. Districts cannot delete Objectives that have School Plan Action Steps associated with them. Deleting these Objectives will invalidate the school plan.

How is an Action Step added to the Planning Tool?

Click the Add Action Step link under the desired Objective, then enter your text.

How can an existing Action Step be modified?

Click the Action Step to be edited, then enter your editorial changes.

How can an existing Action Step be modified?

Click the Action Step to be edited, then enter your editorial changes.

How is an existing Action Step modified?

Click the Action Step to be edited, then enter editorial changes.

How can an Action Step be deleted?

Click Action Step to be deleted and then click the Delete button.

How do I delete an Action Step?

Click the Action Step to be deleted and then click the Delete button.

How is an Action Step deleted?

Click Action Step to be deleted and then click the Delete button.

How is a Fiscal Resource added to the Planning Tool?

Click the Add Fiscal Resource link underneath the appropriate goal.

How can an existing Fiscal Resource be edited?

Click the desired Fiscal Resource (I.E., Title I-A, ECSE) to edit it.

How can a Fiscal Resource be deleted?

Click the desired Fiscal Resource (i.e., Title I-A, ECSE) to edit and then click the delete button on the Edit Fiscal Resource page.

What is the Total Estimated Cost field?

The Total Estimated Cost field is optional. It is a total of the estimated costs for all the Objectives for a single Goal. This number can be compared to the total Fiscal Resources for a year to ensure that LEAs have enough resources to cover their Objectives. This function is an estimation only and does not provide any calculated validation.

What steps are needed to create a School Plan?

To create a School Plan:

1. Select a school from the drop down menu.

2. Click the Create a School Plan link.

3. Click School Action Steps to start.

4. Enter the School Plan Action Steps to the School Plan. The link, Create a School Plan, appears only when users have access rights to that school.

Why can't a School Plan be created?

Contact your local ePAGE Administrator to have your access updated. If the option to create a school plan is not present, the user does not currently have access to edit the plan for that school.

What does the Create School Improvement link do?

The Create School Improvement link allows the selected school to modify its School Plan to meet the Improvement requirements of State and Federal law and regulations.

What does the Create Schoolwide Plan link do?

The Create Schoolwide Plan link allows the selected school to modify its School Plan to meet the Title I Schoolwide requirements. Districts must notify the Nevada Department of Education in the ePAGE History Log that they intend to begin the year-long planning to create a schoolwide program. Only new Schoolwide programs must complete the Schoolwide Plan in the ePAGE. Existing Schoolwide programs must have their plans available locally.

What is an archive plan?

The archive feature allows LEAs to take a snapshot of their plan for future review and create copies of the plan that can be viewed by the general public.

What does the print function do?

The print function creates a full printable view of the entire District/Agency and District Improvement plan in a printer friendly format.

How is an Action Step added?

Click the Add Action Step under the desired Objective and enter the Action Step text.

The Add Action Step link is missing. What is wrong?

Contact your local ePAGE Administrator to have your access updated. The option to create a School Plan Action Step is not present, the user does not have access to edit the plan for that school.

How is an Action Step linked to a Funding Source/Program?

Select the Add Action Step/Program Relationship to link it with a Funding Source/Program.

There aren't any Objectives that align with the Action Steps How can a Objective be added to correct this?

Only LEA users can add Goals and Objectives to the plan. If a user needs to add a School Plan Action Step that does not align with the existing Objective, the user should contact the local ePAGE Administrator to request that an appropriate Objective be added.

What information is needed to create an Action Step?

Action Steps require a title and description.

The fields cannot be modified. What's wrong?

LEAs may require users to use only those items from the Action Step bank. If this is the case, users will not be able to edit the fields when adding an Action Step.

What is the Action Step bank?

The Action Step bank is a collection of Action Steps created by the LEA in collaboration with school representatives. LEAs can allow schools to create their own School Plan Action Steps or they can limit them to only using Action Steps from the Action Step bank.

*** End of this section. ***